CAPITA
CHILDREN'S SERVICES

eStart 3.37a plus ContactPoint, April 2010

eStart Web User Manual

This manual is provided by Capita Children's Services for use by licensed customers of this product. The manual has been created to guide users in how to operate the system in accordance with the design of the product. An editable version of this document is available upon request for customers to tailor and supplement with further detail, however, customers are advised that they should not, under any circumstances, remove any original content from this document. Capita Children's Services cannot be held responsible for any changes, errors or omissions resulting from the subsequent editing of this supplied document.

At the heart of Children's Services.

Contents

General Information Error! Bookmark not defined.

Technical Support 1
Logging into eStart 1
Changing Your Security Answers 2
Colours and Indicators 3
People Icons 3

Find People **4**

The People Search Facility 4
Search Results 5
Request Affiliations 7

Add a Family **9**

Add a New Family 9
Address Details 9
Registration, Setting and Additional Affiliation Details 10
GP and Health Visitors 10
Add Children and Carers 11
Add a Carer 11
Carer's Address and Languages 12
Carer's Smoking History 13
Add a Child 14
Child's Health Details 15

Family **16**

Family Screen 16
Family Icons 17
Registration and Affiliation Details 18
Involvement Start and End Dates 18
Send to ContactPoint 19
Pre-Archive Period 19
Ending and Deleting Involvements 19
Add Setting Involvement for a Member 20
Change an Address 21
Additional Details for a Family 21
Activities 22
Notes 24
Notes History Tab 25
Confidential Notes Tab 26
Summary Tab 26
Service Requests 26
Custom Fields 27
Hard to Reach 27
Items 28
Audit Log and Access Log 28

Carer Record 29
Carer Details ... 29
Name History ... 30
Status ... 30
Date of Death ... 31
ContactPoint Stop Notice ... 31
Left England ... 31
Consent to Store Details on ContactPoint ... 32
Smoking History ... 32
Benefits ... 33
Special Needs ... 33
Disabilities ... 34
Warnings ... 34
Delete a Carer ... 35
Adding Consent to Store Details of Person over 18 on ContactPoint ... 35
Link Documents ... 37
Carer's Record - Additional Details ... 38
Health ... 38
Address and Languages ... 38
Pregnancy ... 39
Child Record 40
Child Details ... 40
ContactPoint Stop Notice ... 41
Left England ... 41
Date of Death ... 41
Carers ... 41
Consent to Store Details on ContactPoint ... 42
CPR History ... 42
Child's Record - Additional Details ... 43
Birth and Development ... 43
Referrals ... 44
Monitoring eStart Use 46
Monitoring eStart Use ... 46
Audit Log ... 46
Access Log ... 48
Merging and Moving 49
Merging and Moving ... 49
Events 52
Events Section ... 52
Event Details ... 53
Event Attendees/Registrants ... 54
Event Outcomes ... 56
View Event Types ... 56
Favourites ... 57
Events Calendar ... 58
Day View ... 59
Week View ... 59
Month View ... 60

Event Recurrence 60

Manage Lists **62**

Manage Lists 62
Create New List 62
Append 66
Export 66
Mail Shot 66
To Excel 69
To CTF 70
My Lists 70
Other Lists 71
List Admin 71

Messages **72**

Sending Messages through eStart 72
Sending an Email through eStart 72
Sending an SMS Message through eStart 73
Inbox 74
Sent Items 74

ContactPoint **76**

ContactPoint Overview 76
ContactPoint and eStart 76
Whose Records are sent to ContactPoint? 77
Search ContactPoint 78
ContactPoint Authentication 78
ContactPoint Search Screen 79
ContactPoint - Child Details 80
Child Details Tab 80
Parent/Carers Tab 80
Service Provisions Tab 81
Disputes 81

Add on Modules **82**

Electronic Registration 82
Getting Started 82
Search for a Form 82
Edit and Submit Your Form 83
Cost Effectiveness 84
How to Access Cost Effectiveness 84
Costs 84
Criteria, Targets and Aims (% of an Event) 85
Criteria, Targets and Aims (Editing) 85
Reports 86
UNA – Universal Needs Assessment 86
Create New UNA 87
Create Default UNA 87
Select UNA to Create 88
View UNA History 88
UNA Maintenance 89
UNA Template Administration 89
Create New Template 89

Start From Scratch 90
Modify Existing Template 92
UNA Score Administration 94
Assign Score Values 94
SEF Builder 96
Manage Templates 96
Build or Update a Template 97
Manage SEFs 97
Create or Update a SEF 98
Run SEFs 99
TCP 100
Setting up Accreditors and Qualifications 100
Add a TCP Course 102
Edit TCP Course 103
Registrants 104
Carer TCP Courses 105

Reports **107**

Reports Overview 107
Types of Report 107
Children Reports 108
Carer Reports 108
Family Reports 108
UNA Reports 109
Registration Reports 109
Event Reach/Volume Reports 110
Non Attendance Reports 110
Pregnancy and Birth Reports 111
Breast Feeding Reports 111
Health Reports 111
Care Worker Reports 111
Development Plan Reports 111
Sure Start Reports 111
Custom Fields 112
Hard To Reach Reports 112
Events by Aims Reports 112
Audit Logs 112
Quarterly Profiles 112
Custom Query Report 112
Report Criteria 113
Running a Report 114
Report Toolbar 114
Exporting a Report 115

Appendix A: eStart Reports - Extended Descriptions **116**

Reach and Volume Reports 116
Children Category 116
Children Seen (Reach) Report 116
Children Seen (Volume) Report 117
Children Seen by Age (Reach) Report 117
Children Seen by Age (Volume) Report 117
Children Seen by Activity (Reach) Report 118

Children Seen by Activity (Volume) Report 118
Children Seen by Activity with Anonymous Report (Volume) 118
Children Now Registered Report 119
Children Registered by Ethnicity Report 119
Children Registered by Disability & Special Needs Report 120
Birth of Children Report 120
Child Birth Weight Report 120
Carers Category 121
Carers Seen (Reach) Report 121
Carers Seen (Volume) Report 122
Carers Seen by Activity (Reach) Report 122
Carers Seen by Activity (Volume) Report 122
Carers Seen by Activity with Anonymous Report 123
Carers Now Registered Report 123
Families Category 124
Families Seen (Reach) Report 124
Families Seen (Volume) Report 124
Families Now Registered Report 125
Mail Merge Families Registered 125
Monthly Summary Members Seen (Reach) Report 125
Monthly Summary Members Seen (Volume) Report 126
Summary Members Seen (Reach) Report 126
Summary Members Seen (Volume) Report 126
UNA Category 127
UNA Report 127
UNA of Family by SCI Scores Report 127
UNA Blank Form Report 127
UNA by SCI Report 127
UNA by Smoking Score Report 128
UNA by Overweight Score Report 128
UNA Score Types Report 128
Completed UNAs Report 128
UNA Items Report 129
UNA Items by Carers with % Report 129
UNA Members with >3 Addresses Report 129
Registration (Joining) Category 130
Families Joining Report 130
Carers & Children Joining Report 130
Carers Joining Report 131
Children Joining Report 131
Event Reach/Volume Category 132
Events (Reach) Report 132
Events (Volume) Report 132
Events (Reach) by Activity Report 133
Events (Volume) by Activity with Anonymous Report 133
Events (Reach) By Provider Report 134
Events (Reach) By Location Report 134
Events (Reach) By Theme Report 135
Events (Reach) By Ethnicity Report 135
Events (Reach) by Outcome Report 136
Members Seen by Ethnicity Report 136

Providers with Events (Basic) Report 136
Providers with Events (Detailed) Report 137
Members Seen By Provider Report 137
Members Seen By Provider and Setting Report 137
Non Attendance Category 138
Children Not Seen Report 138
Carers Not Seen Report 138
Appointments Missed 139
Mothers Not Seen 139
Children Who No Longer Attend Their Registered/Affiliated Setting 139
Carers Who No Longer Attend Their Registered/Affiliated Setting 140
Pregnancy & Birth Category 140
Pregnant Teenagers Now Registered Report 140
Pregnant Women Seen (Reach) Report 141
Births of Children Report 141
Birth of Children by Weight Report 141
Breast Feeding Category 142
Record of Breast Feeding Report 142
Health Category 142
Smoking Record Report 142
Births of Children by Weight Report 142
Careworker Category 143
Careworkers and Events (Reach) Report 143
Careworkers and Events (Volume) Report 143
Careworkers and Events Summary (Reach) Report 143
Careworkers and Events Summary (Volume) Report 144
Careworkers and Hours worked at Events Report 144
Members and Hours spent at Events Report 144
Development Plan Category 145
Dev Plans & Due Dates Report 145
Care Workers working with Dev Plan Targets Report 145
Sure Start Category 146
M3 (Registered at requested Settings) Report 146
M3 (Seen at requested Settings) Report 146
M7 Report 146
NCH Section 1 Report 147
NCH Section 2 Report 147
Custom Fields Category 147
Custom Report 147
Hard to Reach Reports Category 148
Hard to Reach Report 148
Events by Aims Category 148
Event Type Report 148
Children Reach Report 148
Children Volume Report 149
Audit Logs 149
Audit Log Report 149
Quarterly Profiles Category 149
Quarterly Profile Main Report 149
Quarterly Profile Outcomes 151
Quarterly Profile Themes 152

Appendix B: UNA Report Descriptions 153

UNA Report (Latest Assessment) 153
UNA Blank Form Report 154
UNA by SCI (Social Capital Index) Report 155
UNA by Smoking Score Report 156
UNA by Overweight Score Report 157
UNA Score Types Report 158
Completed UNAs Report 159
Completed UNA Items Report 160
UNA Items by Carer Report 161
UNA Members with more than Three Addresses Report 161

Glossary 162

Index 166

eStart User Manual

Technical Support

The Service Desk is available from 8.30am to 5pm for all support calls and for advice regarding Change Requests.

Telephone Support: 0870 2411323

Email: one.support@capita-cs.co.uk

Logging into eStart

To log in, open up Internet Explorer and go to http://www.estartdemo.com and you will be taken to the login screen of the demo site.

When you are provided with your own site's URL for eStart it will begin with https:// - this ensures that it is a secure site so don't forget the "s" in "https" or it won't work!

Before you log in it is a good idea to save this page to your favourite sites, so go to "Favourites" on the top menu of Internet Explorer and select "Add to Favourites". The next time you want to log in you can then just go to the favourites menu and select **eStart Web** without having to type the whole address in again.

The login screen might simply ask you to enter your name and password:

Figure 1 eStart Web login page (standard)

If this is the screen that you see, enter the user name and password provided by your Administrator and you will be taken to the **Home Screen**.

However the decision might have been taken to implement an extra level of security to your eStart system to prevent unauthorised logins. If so, your login screen will look like this:

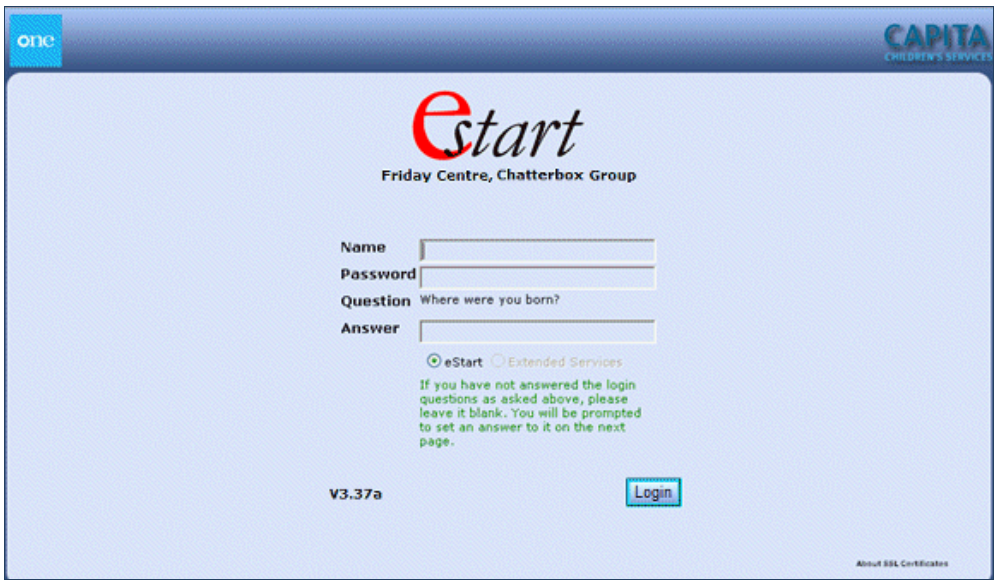


Figure 2 eStart Web login page (with extra security question)

This extended version of the login screen will ask for your user name and password as before, but will also ask you to answer one of a series of questions that you have answered previously and to which only you will know the answers. The first time you encounter this screen you will be able to record your answers (which you can change later if necessary), as described below.

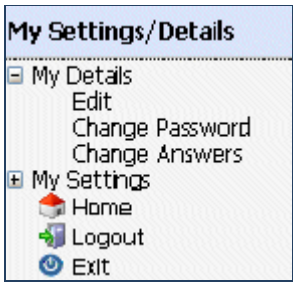
If you see this screen but have never been asked to enter any answers to the security questions before, then DO NOT type anything into the Answer box. Simply enter your user name and password as usual and click the Login button. You will then be taken to a screen where you can enter your answers to the security questions. Once you have entered all the answers you will be logged in as usual. The next time you log in you will be asked one of these questions, selected at random.

When you first type in your answers, make sure that you give answers you will remember and are spelt correctly, as if you give an incorrect or differently spelt answer when you try to log in next time, your login will fail.
Also please note that currently it is not possible to reset your answers if you forget them.

If you have previously entered your answers to the extra security questions in eStart, type the correct answer into the box and click the Login button. If you give an incorrect answer or leave the Answer box empty your login will fail.

Changing Your Security Answers

If you need to change your answers to the security questions you can do this after logging in.



To change your answers to the security questions, go to My Settings/Details, then My Details and click on **Change Answers**.
If the extra security question has not been activated in your version of eStart you will not see this menu option.

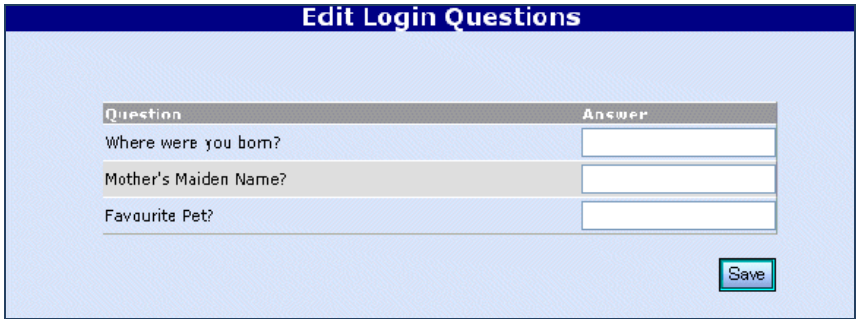


Figure 3 Changing your answers to the security questions

Type in your new answers to the questions and click **Save**. Make sure your answers are memorable and correctly spelt, or you might not be able to log in next time!

Colours and Indicators

In order to highlight important information, certain colours are used throughout eStart.

Where text appears in red, this indicates that more information needs to be added, or that something is incomplete.
Fields in yellow are required fields and the system cannot continue until the field is completed.

To view more details for an individual, click on the Go button .

People Icons

When looking at the results of a search, the individuals will be displayed with different colours and icons:

Baby Girl

Baby Boy

Girl

Boy

Female Carer

Male Carer

Relationship to Child Not Set

Gender Not Set

Find People

The People Search Facility

The **Search** option on eStart allows you to find any individuals that have been entered onto the system.

> ⚠ It is very important to avoid duplication of records so you **must always** search for a person or family **before** you add them onto the system.

Click on **Find People** on the main menu or **Search** in the left hand menu to open the Search.

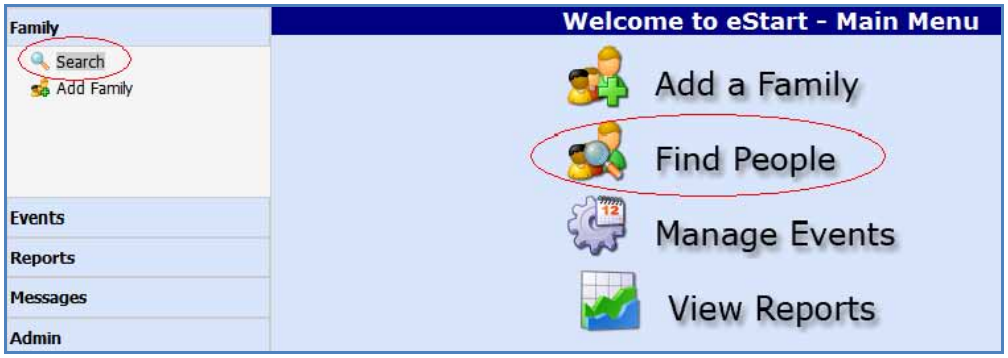


Figure 4 Search for a Person

Using the search facility is a very simple process; you will have to enter in some information and then select the results which match your criteria.

You have many search options to obtain the data that you require; you can search for First Name, Surname, Address, Postcode, Family Status, Member ID, Family ID, Member Status, Type (child, carer or both), the Setting they are registered in and their Date of Birth.

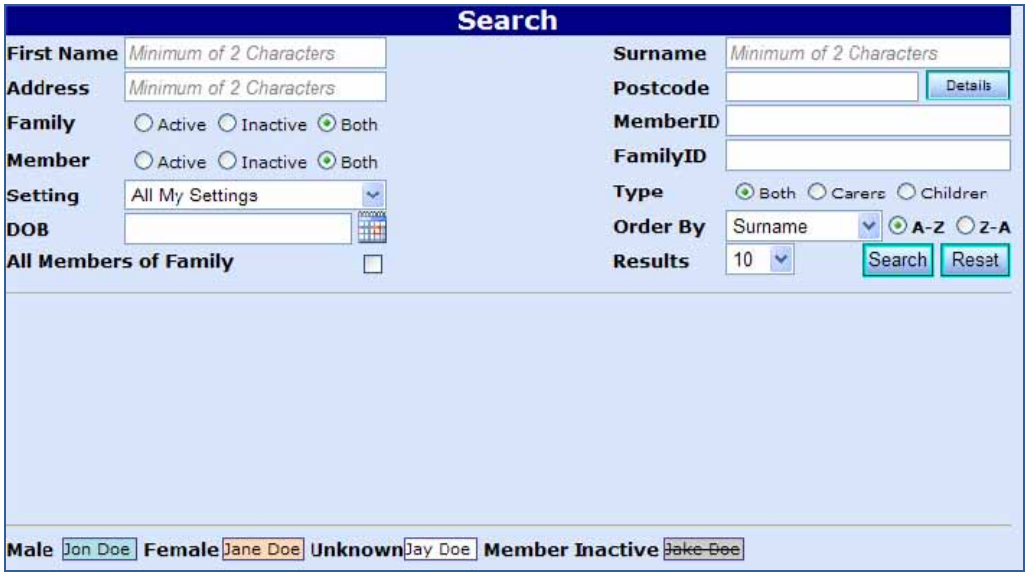


Figure 5 Search for a Person | Search Criteria

You can search using part or all of a name, postcode, family ID number etc. It is better not to make your search too specific, e.g. type in “Jon” instead of “Jones” and “SL4” instead of “SL4 5AA” but you must enter at least **two characters** in any field when you are searching.

You can use the % symbol as a wildcard in eStart searches. This means that if you enter % instead of a character the search will act as if the % is *any* character, including an apostrophe or space e.g. using **D%** in the surname field would result in all the surnames starting with D (Davies, D’Angelo etc). The wildcard is particularly useful when searching for a name such as O'Connor that might have been entered either as O' Connor, O Connor or Oconnor. By entering O% the search will find all of these versions. Entering just %% (i.e. the required minimum two characters) will return all results that meet the other search criteria.

You can also choose whether you wish to see all the members of the family, and whether you would prefer 10, 50, 100 or even 500 results displayed.

Search Results

Once you have the results if you would like them to be displayed in a certain format you can select the **Order by** function.

By default the list will be displayed by Surname, however this can be changed to Name, Address, Postcode, Family ID or Age.

The default search criteria are set to show the Status of the Family and Individual Member as **Both**.

If you enter a postcode, clicking on the **Details** button displays the full address information for that area. It also shows the nearest Children’s Centre / Setting.

If you need to begin the search again, click on the **Reset** button to clear all the fields.

The search can be designed to suit the number of results you want to be displayed; a very basic search will produce a large number of results:

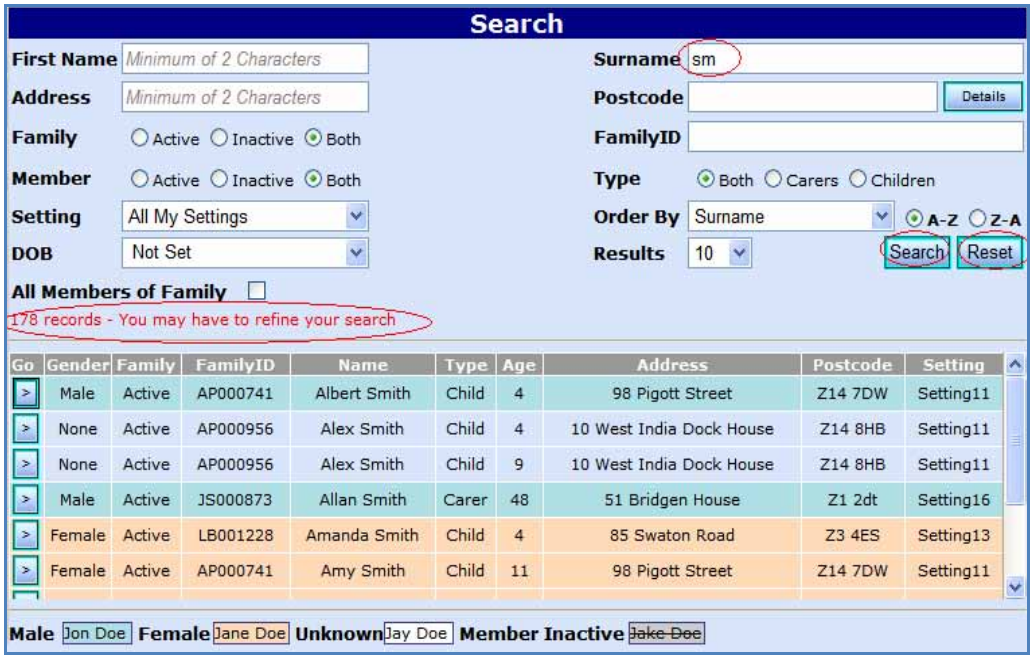

Search
First Name Minimum of 2 Characters
Surname sm
Address Minimum of 2 Characters
Postcode
Details
Family Active Inactive Both
FamilyID
Member Active Inactive Both
Type Both Carers Children
Setting All My Settings
Order By Surname A-Z Z-A
DOB Not Set
Results 10
Search
Reset
All Members of Family
178 records - You may have to refine your search
Go Gender Family FamilyID Name Type Age Address Postcode Setting
Male Active AP000741 Albert Smith Child 4 98 Pigott Street Z14 7DW Setting11
None Active AP000956 Alex Smith Child 4 10 West India Dock House Z14 8HB Setting11
None Active AP000956 Alex Smith Child 9 10 West India Dock House Z14 8HB Setting11
Male Active JS000873 Allan Smith Carer 48 51 Bridgen House Z1 2dt Setting16
Female Active LB001228 Amanda Smith Child 4 85 Swaton Road Z3 4ES Setting13
Female Active AP000741 Amy Smith Child 11 98 Pigott Street Z14 7DW Setting11
Male Jon Doe Female Jane Doe Unknown Jay Doe Member Inactive Jake Doe

Figure 6 Search results using a single criterion

To get the most from your results it is always best to perform a search with more criteria. This will save time having to trawl through all the results.

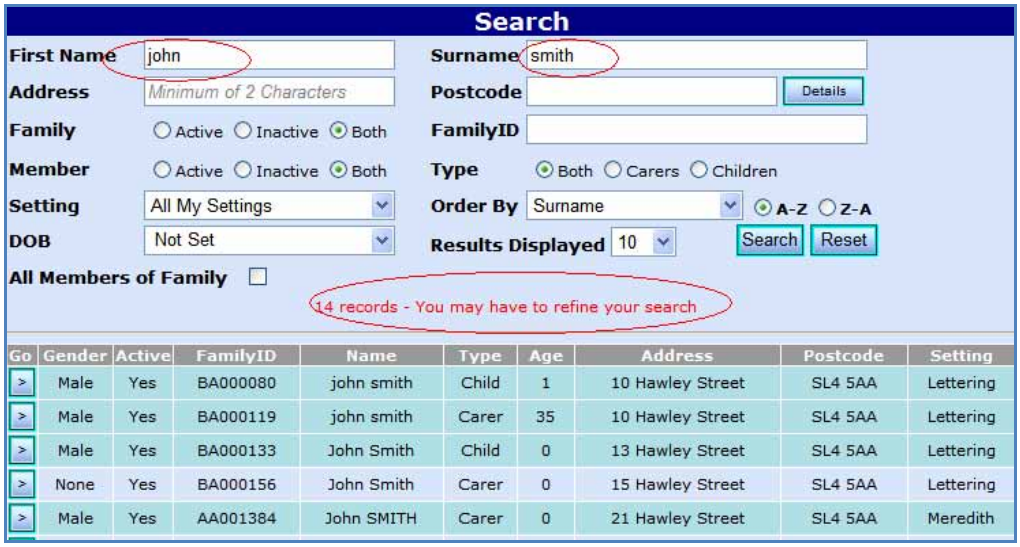

Search
First Name john
Surname smith
Address Minimum of 2 Characters
Postcode
Details
Family Active Inactive Both
FamilyID
Member Active Inactive Both
Type Both Carers Children
Setting All My Settings
Order By Surname A-Z Z-A
DOB Not Set
Results Displayed 10
Search Reset
All Members of Family
14 records - You may have to refine your search
Go Gender Active FamilyID Name Type Age Address Postcode Setting
Male Yes BA000080 john smith Child 1 10 Hawley Street SL4 5AA Lettering
Male Yes BA000119 john smith Carer 35 10 Hawley Street SL4 5AA Lettering
Male Yes BA000133 John Smith Child 0 13 Hawley Street SL4 5AA Lettering
None Yes BA000156 John Smith Carer 0 15 Hawley Street SL4 5AA Lettering
Male Yes AA001384 John SMITH Carer 0 21 Hawley Street SL4 5AA Meredith

Figure 7 Search results using additional criteria

To go to the details for an individual, click the **Go** button against their name and their Family screen will be displayed.

If you are now accessing other areas of eStart, you can always go back to the results of the search by clicking on **Search** then **Results** in the left-hand menu.

Figure 8 Returning to the search results via the menu

This will display the results of the search that was carried out previously.

If you click only on Search, this will give the criteria that were entered, without the results.

You can also select members of the current family and view various details about them using the tree view on the left hand side of the screen.

Figure 9 Current Family tree view

Request Affiliations

If you do not have permissions to edit or manage a family, you can request an affiliation. First, search for the family.

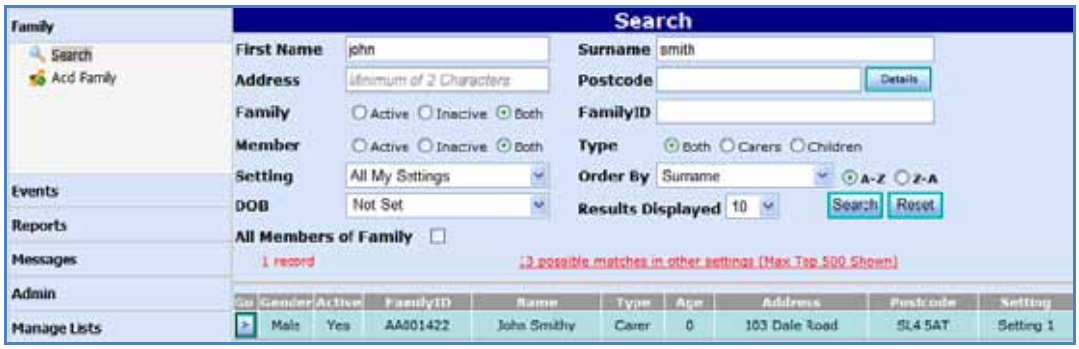


Figure 10 Search results with information message

When you retrieve the results, you may see a message as shown in Figure 10 above: "2 possible matches in other settings" or similar. Click on this message.

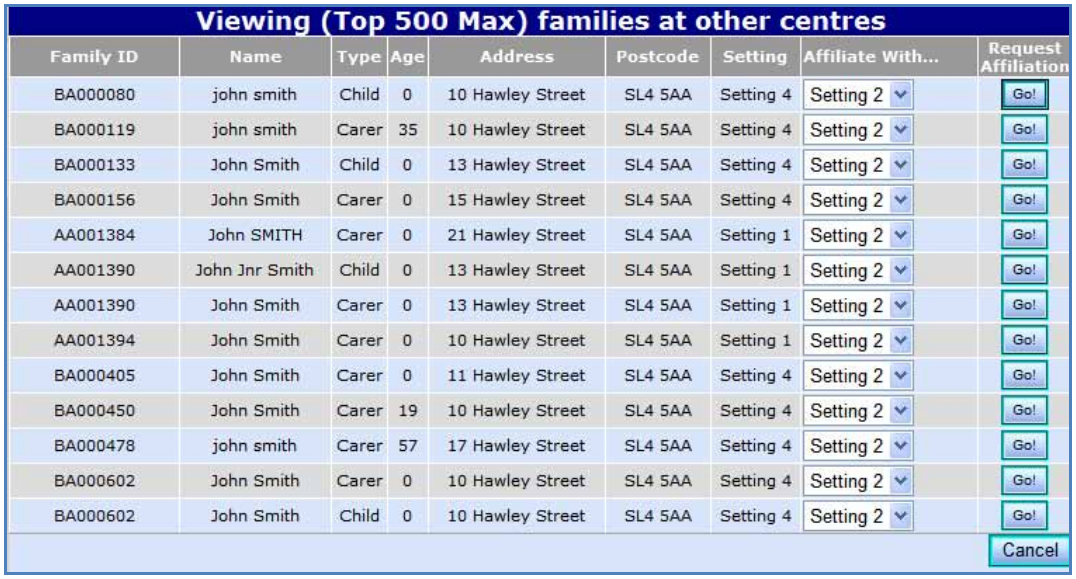

Viewing (Top 500 Max) families at other centres
Family ID
Name
Type
Age
Address
Postcode
Setting
Affiliate With...
Request Affiliation
BA000080 john smith Child 0 10 Hawley Street SL4 5AA Setting 4 Setting 2 Go!
BA000119 john smith Carer 35 10 Hawley Street SL4 5AA Setting 4 Setting 2 Go!
BA000133 John Smith Child 0 13 Hawley Street SL4 5AA Setting 4 Setting 2 Go!
BA000156 John Smith Carer 0 15 Hawley Street SL4 5AA Setting 4 Setting 2 Go!
AA001384 John SMITH Carer 0 21 Hawley Street SL4 5AA Setting 1 Setting 2 Go!
AA001390 John Jnr Smith Child 0 13 Hawley Street SL4 5AA Setting 1 Setting 2 Go!
AA001390 John Smith Carer 0 13 Hawley Street SL4 5AA Setting 1 Setting 2 Go!
AA001394 John Smith Carer 0 10 Hawley Street SL4 5AA Setting 1 Setting 2 Go!
BA000405 John Smith Carer 0 11 Hawley Street SL4 5AA Setting 4 Setting 2 Go!
BA000450 John Smith Carer 19 10 Hawley Street SL4 5AA Setting 4 Setting 2 Go!
BA000478 john smith Carer 57 17 Hawley Street SL4 5AA Setting 4 Setting 2 Go!
BA000602 John Smith Carer 0 10 Hawley Street SL4 5AA Setting 4 Setting 2 Go!
BA000602 John Smith Child 0 10 Hawley Street SL4 5AA Setting 4 Setting 2 Go!
Cancel

Figure 11 Viewing families at other centres

Select **Go** to affiliate the family to another setting.

You will now return to the family screen.

If you are a user with **Administrator** access you can confirm this request.

Select **Admin** (from the left hand menu), then **Affiliation Requests**.

Figure 12 Admin | Affiliation Requests

Select the family you wish to affiliate and click on the **Save** button.

The family has now been affiliated; if you run a search they will now appear in your setting.

Add a Family

Add a New Family

Select **Add a Family** from the Main Page or from the left hand menu.

Figure 13 Add a New Family

Address Details

Complete the fields below. All fields in yellow are mandatory (must be completed).

Figure 14 Add a Family screen

Enter the postcode you require in the Postcode field and click **Lookup** to display a list of known addresses for that postcode. If you are unsure of the postcode, you can enter a house number and part of the address and click **Lookup**. This will produce a list of all addresses which include that particular house number and address.

If you use the postcode search to enter an address that is outside England then the **Outside England** box will be automatically ticked. You can click on it to untick it if necessary; you can also tick the box if you know the address is outside England (for example it is a Welsh, Scottish or Northern Irish address) and it is not automatically ticked[1]. This information will be sent to ContactPoint.

[1] *This is **not** linked to the **Left England** checkbox on the Child Details screen, which must be set separately if relevant.*

Select the correct address from the list and click **Next**.

Figure 15 Add a Family | Matching addresses for a postcode

Registration, Setting and Additional Affiliation Details

You may see the following pop-up on your screen:

There may be another family on the system with the same address or the address was used previously (but may no longer exist); you can click OK and continue.

You will now need to add Date Joined, Registration and Setting.

The setting will default automatically to the postcode the setting is assigned to. This can be changed to another setting using the dropdown. Click **Update Affiliations** to affiliate the family to more settings if you know that they are already linked to them.

Figure 16 Add a Family | Date Joined, Registration Status & Setting

Administrators can add in all postcodes with assigned Settings through the Admin. section.

GP and Health Visitors

Select the family's GP, Centre Health Visitor and Family Health Visitor by using the dropdowns, then click on **Next**.

Figure 17 Add a Family | GP & Health Visitors

Add Children and Carers

Next you can either enter details for a Carer or Child. Alternatively you can click on **Finish** to create the record (if you do this you will need to enter Child and Carer details at a later time).

Figure 18 Add a Family | Add Children & Carers

Add a Carer

If you select **Add Carer** you will need to enter the following information:

Figure 19 Add a Family | Carer Information (1)

By default the new carer's record will be active and the Send Correspondence box will be ticked. You can change these if they are not the settings you need.

You must enter a first name, surname, relationship to child and date of birth. All the other fields are optional.

ContactPoint Stop Notice

ContactPoint only has the legal authority to record information on children up to their 18th birthday. However with their consent vulnerable young people can have their details recorded on ContactPoint up to their 25th birthday.

The ContactPoint information can be recorded for children in eStart, but it can be recorded for carers too. This is because a young carer in eStart can still be a child in ContactPoint terms.

This check box is therefore only relevant if the carer is aged between 18 and 24 and consent has been given for their details to be stored on ContactPoint. If a young person has a **Stop Notice** against them, no data will be sent to ContactPoint for them. A Stop Notice can either be set manually by ticking the box on this screen, or can be automatically set by being included in an acknowledgement from ContactPoint. Anyone aged 18 or over will normally have an automatic Stop Notice unless consent has been given. Under certain circumstances a Stop Notice can be overridden. Please see the topic **Whose Records are sent to ContactPoint?** on page 77 for further details.

Click on the **Next** button to continue or **Cancel** to return to the Add Children and Carers screen.

Now you will need to complete the following details. Click on the **Update** button for the section you want to complete and click on the particular item in the list to add it (if you add one by mistake, just click on it again to remove it).

Click on **Next** when you have finished:

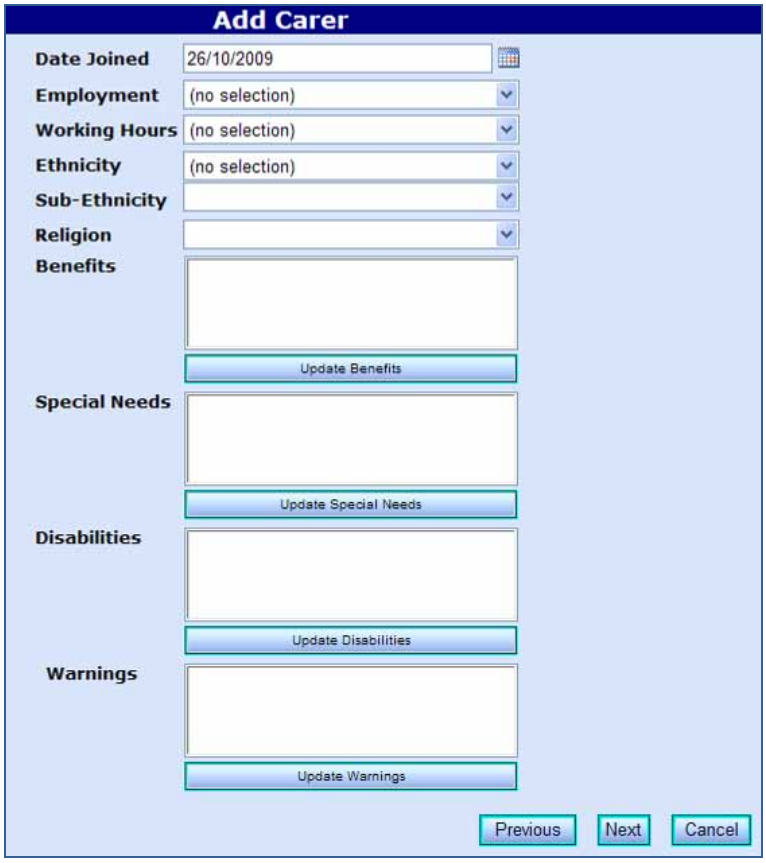


Figure 20 Add a Family | Carer Information (2)

Carer's Address and Languages

Sometimes a carer's address may be different to the child's. In such a case these details can also be added here. You do not need to enter tan address here if it is the same as the family address you have already entered. You will also need to select **Language** details from dropdown lists. Please see below:

Figure 21 Add a Family | Carer Address & Language Details

Carer's Smoking History

You can now enter any smoking history for the carer. This can be left blank if you have nothing to enter. Click on **Finish** when ready.

Figure 22 Add a Family | Carer Smoking History

Administrators can add in more descriptions through the Admin section.

If you are entering smoking details you need to enter both a Reason for Change and a Description. The information will not be saved without these entries. Once these are complete click on **Add**; the details will then be saved and displayed below. Once you have added in the Smoking History, click on **Finish**.

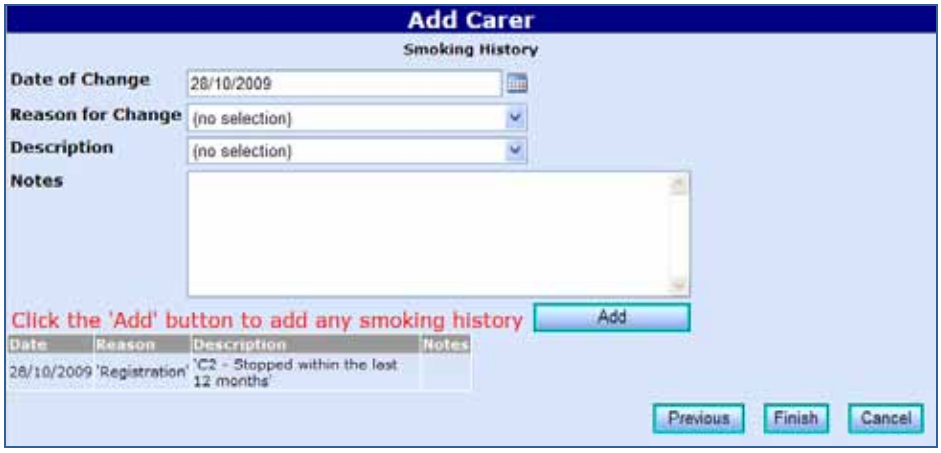


Figure 23 Add a Family | Added Carer Smoking History

Add a Child

Next you can enter details for a Child. Alternatively you can click on **Finish** to create the record (if you do this you will need to enter Child Details at a later time).

Figure 24 Add a Family - new family with Carer details added

If you select **Add Child** you will now need to enter the following information:

Figure 25 Add a Family | Child Information (1)

You must enter a first name, surname and date of birth. All other fields are optional.

ContactPoint Stop Notice

ContactPoint only has the legal authority to record information on children up to their 18th birthday. However with their consent vulnerable young people can have their details recorded on ContactPoint up to their 25th birthday.

This check box is therefore only relevant if the child is aged between 18 and 24 and consent has been given for their details to be stored on ContactPoint. If a young person has a **Stop Notice** against them, no data will be sent to ContactPoint for them. A Stop Notice can either be set

manually by ticking the box on this screen, or can be automatically set by being included in an acknowledgement from ContactPoint. Anyone aged 18 or over will normally have an automatic Stop Notice unless consent has been given. Under certain circumstances a Stop Notice can be overridden. Please see the topic **Whose Records are sent to ContactPoint?** on page 77 for further details.

Carers

There are two lists of carers for a child - those with **Parental Responsibility** and **Other Carers for this child**. Anyone who has been added as a carer for the family will be listed in both edit list drop downs, however when you click on a name in one of the drop down lists to select them, they will disappear from the other list i.e. the two lists are mutually exclusive.

Carers with Parental Responsibility will have their name and contact details included in the information that is sent to ContactPoint.
Other Carers for this child might include, for example, an adult within the household who is the parent of other children within the same family but not of this child. Such people might be carers but would not necessarily have parental responsibility.

You can now enter further details about the child including Date Joined, Status, Gender, Religion and Special Needs.

Figure 26 Add a Family | Child Information (2)

Child's Health Details

Next you can now enter Health Details for the child. Click on **Finish** when you are ready.

Figure 27 Add a Family | Child Health Details

If you wish to add another carer or child then you can do so by either selecting **Add Carer** or **Add Child**. This can also be carried out at a later stage.

Clicking on **Finish** will take you back to the **Add Children and Carers** screen. Click **Finish** on this screen to go to the family record you have created.

Family

Family Screen

This screen will be displayed when you have selected a member on the search screen or when you click on **Current Family** in the left hand menu.

The Family screen shows all the main information about a family. You will see all the basic details such as Address, Telephone Number, Date Joined, Registration, GP, Health Visitor information, the Setting in which they belong and also whether they have been Affiliated.

You will also see the **Status** of the family and all carers and children that are included in this family.

Figure 28 Family screen

To add a carer or child to the current family, select the buttons situated at the top right hand side. To view the current carer or child record, click on the **Go** button next to their name.

You can make changes to a family record by simply selecting from the relevant dropdown and then clicking on **Save**.

Please note that in order to make a family completely inactive you need to make all the members of the family inactive as well. Simply changing the Family Status to **Inactive** will not make all the members of that family inactive.

If you use the postcode search to enter an address that is outside England then the **Outside England** box will be automatically ticked. You can click on it to untick it if necessary; you can also tick the box if you know the address is outside England (for example it is a Welsh, Scottish or Northern Irish address) and it is not automatically ticked[2]. This information will be sent to ContactPoint.

[2] *This is **not** linked to the **Left England** checkbox on the Child Details screen, which must be set separately if relevant.*

Map

The **Map** button allows you to view an area on a map. The area is usually where the family address is located.

To view an area simply click on the Map button on the Family screen This will open up a new window and take you to a website which will show a map of where the area is located.

Family Icons

On the **Family** screen there are many different icons which represent different details about a family. If an icon is greyed out then it does not apply to the family, however if it is highlighted then it is applicable.

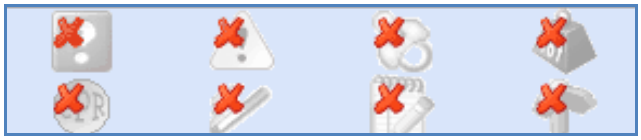


Figure 29 Icons not applicable for a family

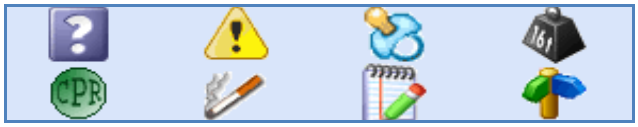


Figure 30 Icons applicable for a family

This icon represents Families that are **Out of Area**, have no children within the **age range** for attending a children's centre and have **no pregnant carer**.

This icon represents Carers who have **warnings** against them.

This icon represents **pregnant carers** and will be highlighted if any carers are pregnant.

This icon represents children with a **low birth weight** within the family.

This icon represents children who are on the **Child Protection Register**.

This icon represents families that have carers who **smoke**.

This icon represents a **Notes History** for the family and it will be highlighted if there are any notes stored against the family.

This icon represents Families that have **Open referrals.**

Hovering your mouse above any of these icons will display further details pertaining to that icon.

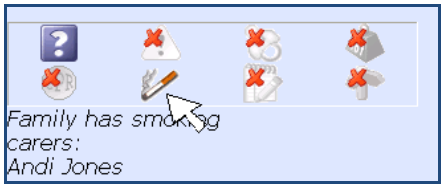
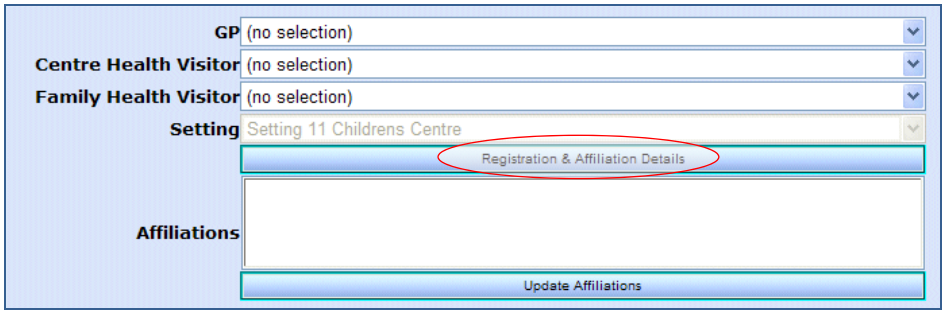


Figure 31 Hovering over family icon

Registration and Affiliation Details

To view the details of all the Settings with which this family are involved, click on the Registration and Affiliation Details button on the Family Details screen.



The following screen will now be displayed (Registrations and Affiliations are known as "Involvements" for the purposes of ContactPoint):

Setting Involvement Details for Family KS001548
Add
Back
Name
DOB
Type
Setting
Involvement Started
Involvement Ended
Pre-Archive Period
Last Updated
Send To ContactPoint
James Abatgxn 02/01/10 Child Friday Centre 04/02/2010 (no selection) 04/02/10 10:09:40 Save Delete
Jennie Abatgxn 16/12/07 Child Friday Centre 05/02/2010 (no selection) 05/02/10 10:29:31 Save Delete
Whauw Abatgxn 03/05/05 Child Friday Centre 02/02/2010 03/02/2010 (no selection) 04/02/10 10:15:38 Save Delete
Odtxn Mngwolh 05/09/66 Carer Friday Centre 02/02/2010 (no selection) 02/02/10 09:19:57 Save Delete
Wxqss Ganwrqo 30/08/88 Carer Friday Centre 02/02/2010 (no selection) 02/02/10 09:19:57 Save Delete

Figure 32 Registration and Affiliation Details screen (NB this screen shot contains some scrambled data)

There will be one line of information for each member of the family, for each Children's Centre with which they are affiliated. Some of the information can be changed - if you make any changes, click the **Save** button for that line.

- ContactPoint expects that an end date should be recorded for an involvement if the member has had no contact with the Children's centre for 90 days.
- It is possible for there to be two lines for a single child or carer at a single Children's Centre if they leave the centre and then come back at a later date.

Involvement Start and End Dates

Initially the involvement dates will default to the same date for the whole family but you can change them if necessary.

- The **Involvement Started** date cannot be empty and is included in the information that is sent to ContactPoint. This is the date on which the family members were registered or affiliated to the setting.
- The **Involvement Ended** date can be entered here or can be added when a member is made inactive through the Status setting on the Child or Carer Details screen. When a member is made inactive all open affiliations and registrations for them will be ended and given today's date as the Involvement Ended date.

Send to ContactPoint

The **Send to ContactPoint** box will automatically be ticked. It can be unticked by clicking if, for example, it has been decided that this is only a fleeting contact and not significant, therefore the involvement record should not be sent to ContactPoint.

The status of this box is only linked to this specific involvement record and does not affect any other information that is sent. For example, if the person is a carer with parental responsibility then if a fragment for the child for whom they are responsible is sent to ContactPoint their name and contact details will be sent, but this will not be related to this involvement.

If this box is ticked it does **not** automatically mean that information about this person's involvement with this setting will **always** be sent to ContactPoint. Information about the involvement will only be sent to ContactPoint **if a fragment is sent for the person**, as shown in the following examples:

- If the person is 25 or over then this involvement will not be sent even if the box is ticked, as fragments are not sent for people of that age. If, however, the age has been entered in error and is later corrected to be e.g. 16, then the involvement will be sent as part of a fragment (as long as the box has been left ticked).
- If the person is aged between 18 and 24, then if the box is ticked the involvement will only be sent if Consent has been given for their fragment to be sent to ContactPoint.
- If a Stop Notice has been recorded on their record then if the box is ticked the involvement will not be sent to ContactPoint as no fragment will be sent.

If a child has been added with a date of birth in the future then they will be included in the list but the involvement will not be sent to ContactPoint. The **Send to ContactPoint** box will not be ticked and you will not be able to edit this until after the birth date has passed.

Pre-Archive Period

The **Pre-Archive Period** is the length of time the involvement record will be held on ContactPoint after the involvement has ended. The options available from the dropdown range from one to five years. If you do not make a selection then the pre-archive period will be one year.

Ending and Deleting Involvements

It is important to note the difference between **ending** an involvement and **deleting** an involvement:

- If you **end** an involvement (by entering an Involvement Ended date or by a member being made inactive), then that information will be sent to ContactPoint and all the details relating to the involvement will be kept for the selected pre-archive period.
- If you **delete** an involvement, maybe because it was entered in error (by clicking on the Delete button on the right hand end of a line of information on this screen), then an "Archive fragment[3]" will be sent to ContactPoint indicating that the information about the involvement should be removed. When a successful response has been received back from ContactPoint (i.e. the Archive process has succeeded), the fragment will automatically be sent again, with all the relevant information about the child, but without the deleted involvement (this is because ContactPoint still needs to know about the child, just not about this deleted involvement).[4]

[3] *A fragment is made up of the child record and all contact details deemed worth sending. See* ***ContactPoint and eStart*** *on page 67 for an explanation of fragments and what is contained within them.*
[4] *If the Archive process fails then an Administrator will need to send the fragment manually as the automatic send will not happen.*

Add Setting Involvement for a Member

If the family has a member who does not have an involvement for one or more of the settings to which the other family members are registered or affiliated and you would like to add an involvement, click the **Add** button at the top of the screen to open the **Add Setting Involvement** screen.

Figure 33 Add Setting Involvement screen

Use the member drop down to select the person to whom you will add the involvement. Once you have chosen a name eStart will check to see which of the family's settings do not have an involvement for this person. You will now not be able to change the name of the member without cancelling and starting again.

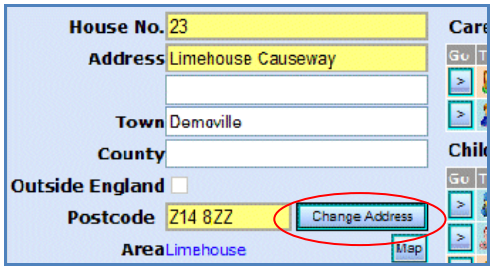
Choose the name of the setting from the list and enter the start date of the Involvement. If the end date is known then you can also enter this here. You cannot enter dates that overlap with another Involvement for the same member at the same setting. You can, however, have one Involvement ending and another one starting on the same day for the same member and setting.

The **Pre-Archive Period** and **Send to ContactPoint** checkbox are as described under Registration and Affiliation Details.

When you click the **Save** button you will be returned to the previous screen and a new line will have been added for the member and involvement you have just added.

Change an Address

If you have been notified by the family that the address has changed, then click on **Change Address**.



The following screen will now be displayed:

Figure 34 Changing a family address

You can enter the new address here using the postcode lookup tool. Select the date they moved in and click **Save**. The family address will now be updated.

The **Outside England** box should be ticked if the new address is not in England (for example it is a Welsh, Scottish or Northern Irish address).

Additional Details for a Family

Using the left hand menu, below Carers and Children there are various extra details that can be added to the family.

The options are: Activities, Notes, Service Requests, Custom Fields, Hard to Reach, Items and Family UNA.

Figure 35 Additional Family Menu Options

Activities

When you click on **Activities**, the screen will display a list of all Events attended by this member. All of these Events and Activities are known as **Contacts**.

To add an Activity for the family, expand the Activities section, and select **New Contact**. If you wish to view current activities attended by the family then select **Existing Contact**.

Figure 36 Family | Activities

To add a family contact, first select the Setting (by which it is held) from the Settings dropdown list.

Figure 37 Activities (New Contact) screen

This will then make the Home visit check box and Event Type dropdown list available:

Figure 38 Activities (New Contact) screen with Setting selected

Tick the Home Visit box if appropriate and then select the Event Type. This, in turn, will make available the Date Range (from / to) selectors.

Figure 39 Activities screen with setting and event type selected

Enter the dates from and to, or click on the calendar icons to the left of the text box and select the date from the calendar that is displayed. Once this is done, click search.

A list of event dates will then be displayed along with a tick box to the left hand side of each event date.

The screen will then look like the example below:

Figure 40 Activities screen with date range selected

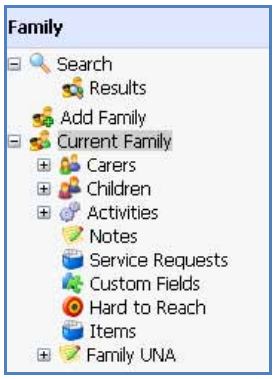
To add a family, care worker or health visitor (or multiple family members, care workers or health visitors) to an event instance (or multiple event instances) simply click on the tick boxes of the individuals you wish to add and the event dates to which you wish to add them and click **Save**.

Notes

eStart allows you to keep two sorts of notes on carers, children and families.

These are **General Notes** (Notes History) and **Confidential Notes** (which are not viewable by general users and have a higher permission level).

Your ability to view / create a Notes History and Confidential Notes will depend on your level of permissions (see the eStart Web Administration Manual for more details).



Notes for the current family and for the children and carers in that family are accessible via the tree view.

Figure 41 Current Family node

Family notes appear under the Current Family node.

To view notes for a carer or child within the family, however, you must expand the child or carer node (click the plus symbol to the left) and expand the node again for the carer/child in question.

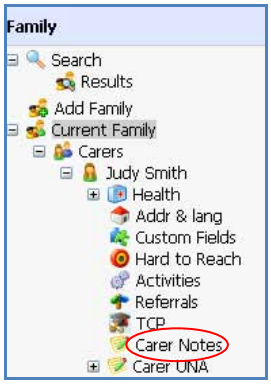


Figure 42 Carer notes

On clicking **Notes** you will be taken to a screen with three tabs. The first, which is highlighted, is **Notes History**.

Notes History Tab

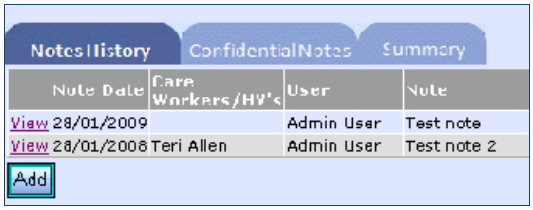


Figure 43 Notes History tab

This gives details of any general notes and allows you to add new notes via the **Add** Button.

When you click the **Add** button a text editor opens to allow you to add your notes:

Figure 44 Individual Note History

When adding a General Note in the Notes History you can select the date and relevant Careworker or Health visitor, before clicking Save to complete.

You can also view existing notes by clicking the **view** option to the left of the note date. This will present you with a similar screen detailing the full text of the note selected.

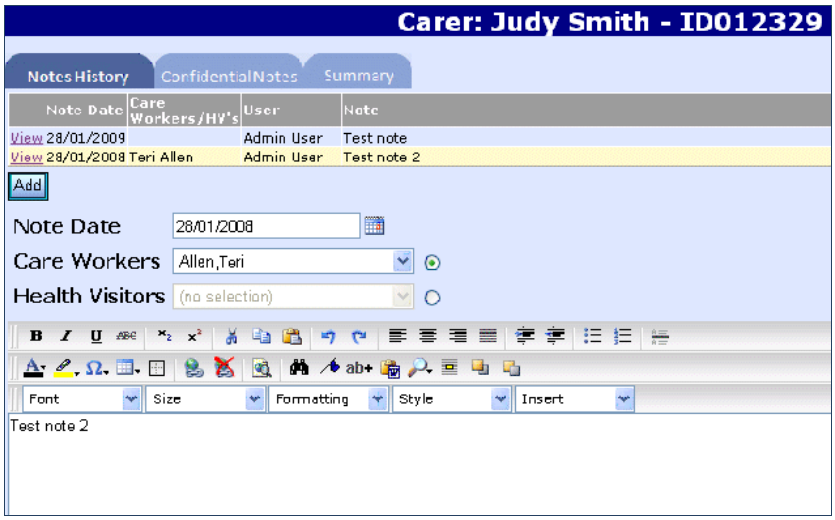


Figure 45 Entering Note Details

Confidential Notes Tab

This tab presents you with exactly the same options as the Notes History tab but is intended for notes of a private nature. Only users who have a suitably high level of permission will be able to view Confidential Notes.

Summary Tab

This is a printable list of notes. You can check the Only Notes History or Only Confidential Notes checkboxes to display one or the other or leave both boxes empty to display both types (if you have the correct permission level to view Confidential Notes).

Figure 46 Notes Summary tab

Service Requests

Service Requests can be added to a family's account; this is for families that have been referred to external agencies, and eStart can then record assessments on the family.

Click on **Service Requests**, and then choose **New Service Request**.

You should now complete all fields with a dropdown list and click the **Save** button.

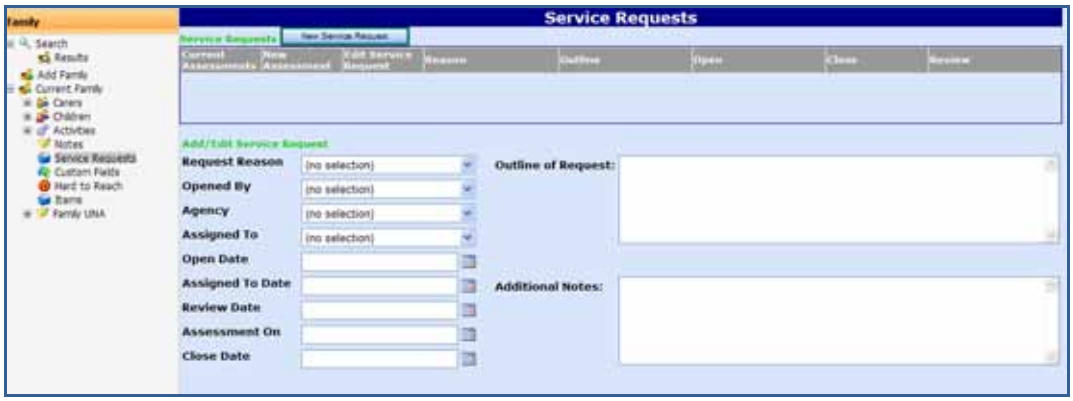


Figure 47 Family | Service Requests

Administrators can add items to all the dropdowns through the Admin section.

Custom Fields

These reports are for families only. Many more reports are available through the Reports menu.

Custom Fields allows you to generate reports on statistical data. If one of the fields has been ticked, a report can be run to produce a list of all families who had this option ticked.

Administrators can add in more fields through the Admin section.

Figure 48 Family | Custom Fields

Hard to Reach

The **Hard to Reach** section works similarly to Custom Fields. It records information about a family to highlight if they meet certain criteria for reporting. When a report is generated it will pick up all families who have had one of these fields ticked on their record.

Click on a box to select a criterion. You can choose more than one. When you have chosen a criterion you will then be able to type into the Value field if you wish. You will then need to click on the **Save** button.

Administrators can add in more fields through the Admin section.

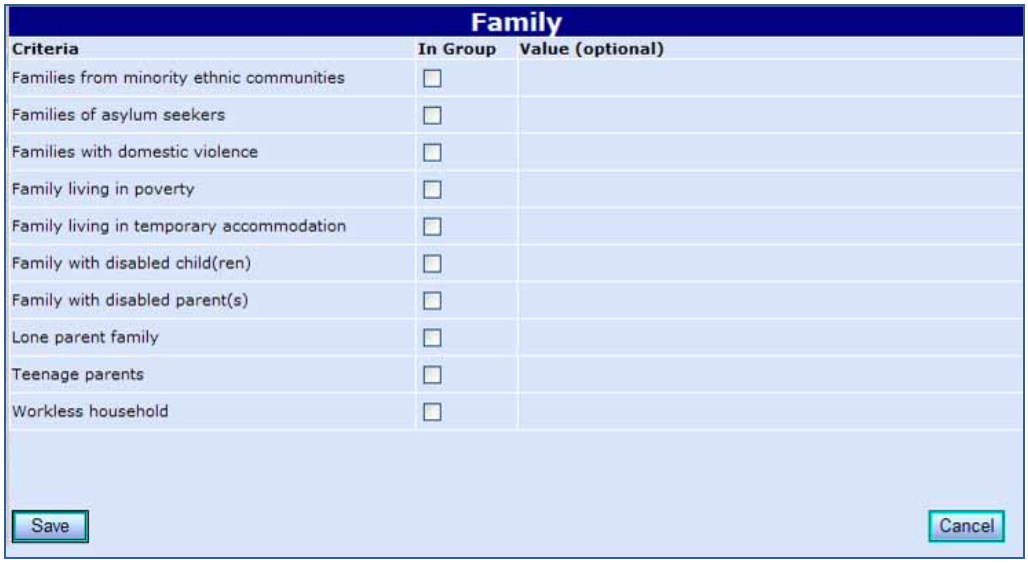


Figure 49 Family | Hard to Reach

Items

The **Items** section is used for to record whether any material has been borrowed by the family; to add new items, please select **Add New**. When you have chosen an item and added dates if required, click on **Insert** to add it to the family's record. You can later click on **Edit** to change any of the details for this item, then click **Update** to save the changes.

Figure 50 Family | Items

Audit Log and Access Log

If you have been given permission to access these areas, the Access and Audit Logs within eStart allow you to see who has viewed or made changes to a particular Carer, Child or Family record within a selected date range and also to see exactly which items within a record were changed.

For a more detailed explanation of these areas please see the chapter **Monitoring eStart Use** on page 46.

Carer Record

Carer Details

To access and view or change the details of a Carer, you first need to use the Search facility to open the Family Details screen.

When you have accessed the Family Screen, click on a Carer's name in the left hand menu or click on the **Go** button next to their name in the list of family members to open their record.

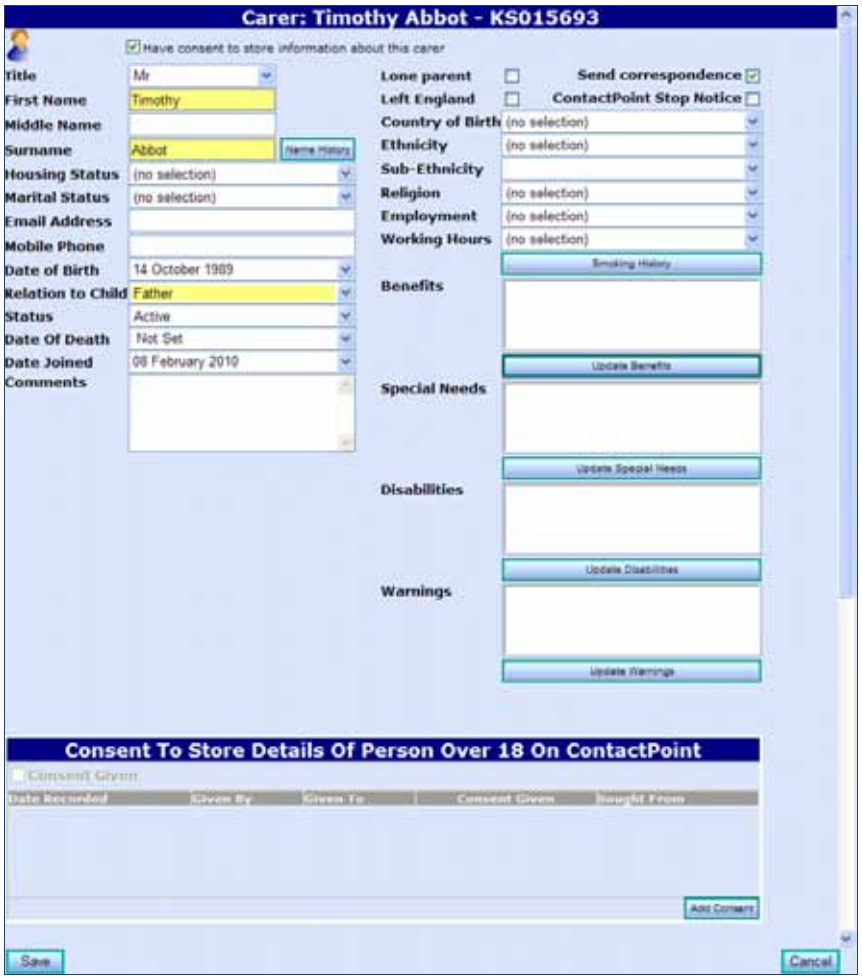


Figure 51 Carer Details screen

On this screen are all the basic details of the carer. You can edit these details from here. For some of the information (e.g. Benefits, Special Needs) you will need to click on the Update button to choose the entry from a list.

Name History

If the carer's name has been incorrectly entered or has changed since registration, then click on **Name History.**

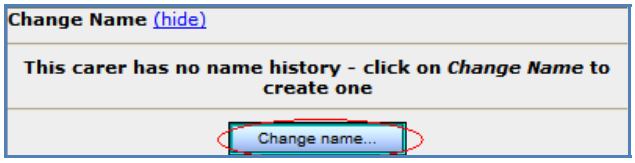


Figure 52 Family | Carer screen

You will only be able to access Name History if you have the correct permission levels set for your account.

The following screen will now be displayed. Please complete all the necessary fields. A **Reason for Change** must be chosen otherwise it will not save.

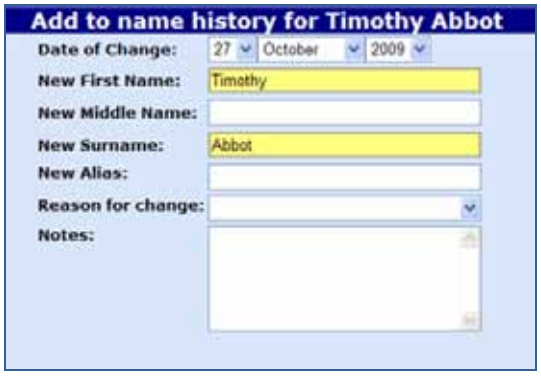


Figure 53 Name Change Details

Administrators can add in more reasons through the Admin section.

Status

This dropdown determines whether an individual Carer or Child is **Active** or **Inactive** and, if they are Inactive, a reason for this. The entries in this list will have been defined by a Console Administrator. If you are selecting an Inactive entry it is important to choose the correct one, as if the ContactPoint funcionality is in use this choice will determine whether or not information about this person is still sent to ContactPoint and if their record is archived from ContactPoint.

For all "real" people, if they are made inactive on the system (even if this is due to their death), it should still be possible to send information to ContactPoint - i.e. Communication to ContactPoint must continue.

The Communication to ContactPoint options that can be set by a Console Administrator for an **Inactive** status are:

- **Continue Communication with ContactPoint** – information for the person is still sent to ContactPoint
- **Cease Communication with ContactPoint** – information for the person is no longer sent to ContactPoint
- **Archive person from ContactPoint** – the person is archived from ContactPoint.

The *only* people whose records should be **inactive** *and* have **Communication to ContactPoint** set to **Archive Person** or **Cease Communication with ContactPoint** are those that were entered as a test, in error or that are duplicates.

When you make a person inactive you will be warned that all open affiliations and registrations will be ended. If you continue then all involvements for this member that do not have an end date or that have an end date in the future will have this set to today's date. This information is sent to ContactPoint.

The Involvement End date is displayed (and can be edited) in the **Involvement Ended** field on the Setting Involvement Details screen that is opened when you click on the Registration and Affiliation Details button on the Family screen.

Date of Death

You cannot save a Date of Death for a person unless their status has been set to inactive. If the carer is aged between 18 and 24 and consent has been given for their details to be stored on ContactPoint, if they are inactive on the system (even if this is due to their death), it might still be necessary for information to be sent to ContactPoint. ContactPoint retains information on young people that have died up to a year after the date of death.The only inactive records where information will not be sent to ContactPoint are those where the inactive reason indicates that they were added as a test, in error or are duplicates.

ContactPoint Stop Notice

This check box is only relevant if the carer is aged between 18 and 24 and consent has been given for their details to be stored on ContactPoint. If a child or young person has a **Stop Notice** against them, no data will be sent to ContactPoint for them. A Stop Notice can either be set manually by ticking the box on this screen, or can be automatically set by being included in an acknowledgement from ContactPoint. Anyone aged 18 or over will normally have an automatic Stop Notice unless consent has been given. Under certain circumstances a Stop Notice can be overridden. Please see the topic **Whose Records are sent to ContactPoint?** on page 77 for further details.

Left England

The **Left England** checkbox also relates to ContactPoint and is only relevant if the carer is aged between 18 and 24 and consent has been given for their details to be stored on ContactPoint. Only children/young people that live in England can have their details sent to ContactPoint. You should tick the **Left England** box if you know that they have left England and do not intend to return within three years.

If an address has already been recorded for them, if necessary you can tick this box even if you do not have their new address outside England. However if the box is already ticked (so indicating that they live outside England) and you enter a new address that is inside England you will be alerted of this.
Note that this checkbox is **not** linked to the **Outside England** box in the Address Details.

If a carer has **Left England** ticked true, and their address has OutsideEngland ticked true, then ContactPoint will send a Stop notice to eStart to prevent the carer being sent to them.

Returning to England

When ContactPoint receives notification that a young person has left England, it will archive their record, because it no longer has the legal authority to store their information. Therefore, if a young person who has given consent for their details to be sent to ContactPoint and has the **Left England** box ticked moves back into England, they will need to be unarchived to restore their details onto ContactPoint. eStart cannot make a request to unarchive. Instead it is a manual process that is requested through the Local Authority ContactPoint Administrator.

Consent to Store Details on ContactPoint

ContactPoint only has the legal authority to record information on children up to their 18th birthday. However there is an exception to this. With their consent, vulnerable young people can have their details recorded on ContactPoint up to their 25th birthday.

This is when it is believed that it would be in the young person's interest to retain their record on ContactPoint after reaching the age of 18 and requires informed and explicit consent from the individual, and also ensures that ContactPoint legal requirements (as defined in The Children Act 2004 Information Database (England) Regulations 2007) have been met. It also includes young persons accessing Connexions services (until their 19th birthday), as well as individuals who have been looked after children, or have learning difficulties, to assist with transition to adult services (until their 25th birthday).

To accommodate this, eStart allows this Consent to be recorded against a young person. Access to this functionality is only allowed if the person is 17 or over. This allows the Consent to be stored before their 18th birthday so that there is no break in the information that is sent. As a result of this, the **Add Consent** button on the Carer Details screen will only be active for people aged between 17 and 24.

To complete consent details for ContactPoint click the **Add Consent** button which is available on the Child and Carer Details screens. See **Adding Consent to Store Details of Person over 18 on ContactPoint** on page 35.

Smoking History

To add or update a Smoking History for the carer, click on the **Smoking History** button, and then click on **Change Smoking History**.

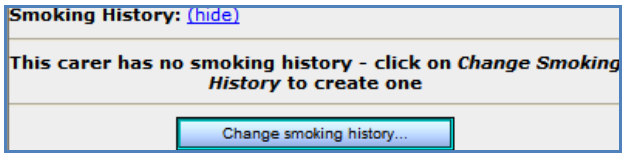

Smoking History: (hide)
This carer has no smoking history - click on Change Smoking History to create one
Change smoking history...

Figure 54 Smoking History | Change Smoking History

Please update all requested information. A reason must also be added in otherwise this information will not be saved. Click Add to save and display the changes, then **Finish**.

Figure 55 Smoking History Change Details

Administrators can add in more reasons through the Admin. section.

Benefits

To add information about any benefits this carer is receiving (for example any Jobseekers Allowances or Disability Benefits), click on the **Update Benefits** button to display a list of benefits in the lower box.

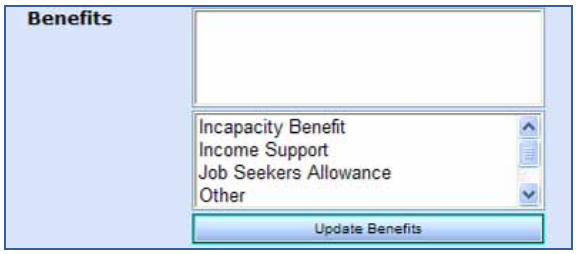


Figure 56 Update Benefits Information

Select a Benefit from the list in the lower box by clicking on it.

Your selection will now appear in the Benefits box above. You can remove a Benefit from the upper box in the same way, by clicking on it to move it back to the lower box. To finish simply click on **Save** in the bottom left hand corner.

Administrators can add in more Benefits if needed, through the Admin section.

Special Needs

To update this information please click on the **Update Special Needs** button.

You will now have a list of Special Needs to choose from.

Figure 57 Update Special Needs

Select a Special Need from the list in the lower box by clicking on it.

Your selection will now appear in the Special Needs box above. You can remove a Special Need from the upper box in the same way, by clicking on it to move it back to the lower box. To finish simply click on **Save** in the bottom left hand corner.

Administrators can add in more Special Needs if needed, through the Admin section.

Disabilities

To update this information please click on the **Update Disabilities** button.

You will now have a list of Disability descriptions to choose from.

Figure 58 Update Disabilities

Select a Disability description from the list in the lower box by clicking on it.

Your selection will now appear in the warning box above. You can remove a description from the upper box in the same way, by clicking on it to move it back to the lower box. To finish simply click on **Save** in the bottom left hand corner.

Administrators can add in more Disability descriptions if needed, through the Admin section.

Warnings

This is used for Care Workers who may visit certain sites which may have restrictions or other aspects they need to be aware of. Clicking on **Update Warnings** will allow users to add a warning against the family record.

Figure 59 Update Warnings

Select a Warning description from the list in the lower box by clicking on it.

Your selection will now appear in the warning box above. You can remove a Warning from the upper box in the same way, by clicking on it to move it back to the lower box. To finish simply click on **Save** in the bottom left hand corner.

Figure 60 Add Warnings

Administrators can add in more Warning descriptions if needed, through the Admin section.

Delete a Carer

It is not recommended to delete carers from the system as this information may be required for reporting purposes. However if a carer has requested a deletion of their account, then it can be removed.
Firstly the status of the individual will be set to active; this will need to be changed to inactive. Click on **Save** and a **Delete** button will appear; this allows you to remove the person from the system.

Figure 61 Delete a Carer

Administrators can add in more Status options through the Admin section.

Adding Consent to Store Details of Person over 18 on ContactPoint

The **Consent to Store Details of Person 18 and over on ContactPoint** screen is opened by clicking the **Add Consent** button from the Carer or Child Details screen. It gives the facility for records of some young adults to stay on ContactPoint until they are 25, but only for very limited reasons and only with explicit consent.

The functionality on this screen is only enabled for young people over 17 years old.

When the screen is opened, the **Consent Recorded** and **Sought Date/Time** fields will automatically be set to the current system date and time. You can keep these settings or enter new dates and times.

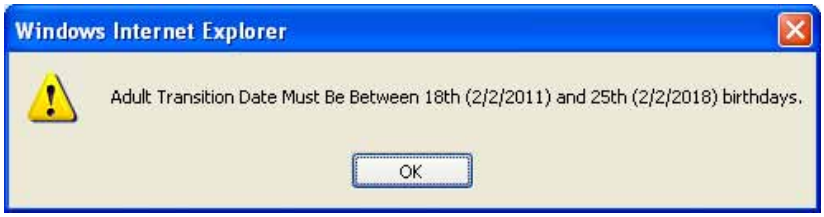
Figure 62 Consent to Store Details of Person over 18 on ContactPoint screen

If Consent has been Given

- Tick the **Consent Given** box and complete the Person who gave consent and to whom consent was given fields - click on **Select** to open a search window.
- Add the **Adult Transition Date** (18 to 25 years old). The **Adult Transition Date** is the date on which the vulnerable young person will be considered an adult. This is the date on which the young person's details will be archived from ContactPoint.
- Add this point you can add notes in the **Memo** field but you cannot yet link any supporting documents. If you need to link documents to the Consent you first need to save the Consent, then open it again from the Child/Carer Details screen.

Figure 63 Consent to Store Details of Person over 18 on ContactPoint - details completed

You will not be able to save the Consent if the Adult Transition Date has not been set to between the young person's 18th and 25th birthdays. A warning message will be displayed if you try to save this screen and the Adult Transition Date is not within this range.



If Consent has been Denied

You need to untick the box at the top of this screen in order to record the fact that consent has not been given.

You do not need to select any names but you can if you wish to.

You cannot enter an Adult Transition Date if the Consent Given/Denied box has been unticked. This is because if consent has not been given to store the details of a person over 18 their details must be archived from ContactPoint when they turn 18.

Link Documents

Once a Consent (whether it was given or denied) has been saved, you can link documents to it. You need to click on the particular Consent at the bottom of the Child/Carer Details screen:

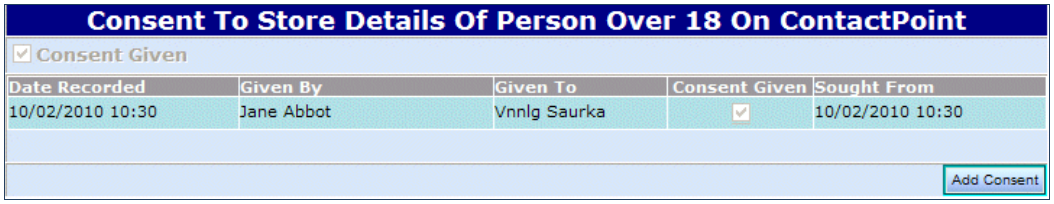


Figure 64 Consent to Store Details of Person over 18 displayed on Child/Carer Details screen

This will open the details of this consent and you can now link any documents to it. You will not be able to edit any other details but you can add a text note in the Memo field if necessary.

Figure 65 Consent to Store Details of Person over 18 on ContactPoint - Link Documents

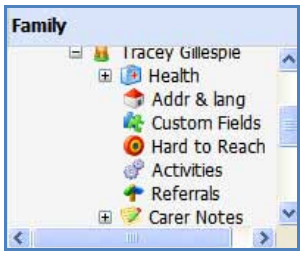
Click on the **Browse** button and find the document you want to link. Double click on the file name or click Open. The file name will then be displayed in the field on this screen.

Click **Upload** to load the document into eStart.

Here you can see that a pdf file has been uploaded. If you click on the file name the file will open.

Figure 66 Document Linked from ContactPoint Consent screen

Carer's Record - Additional Details



There are more extra details that can be added to a Carer's record. These are displayed in the left hand menu and many of these have been explained in the **Family** section.

Figure 67 Additional Details available for a Carer record

Health

If you expand this section, you are presented with a history option. This section records all health information about the carer; if you click on **Add Contact** a new screen will be displayed.

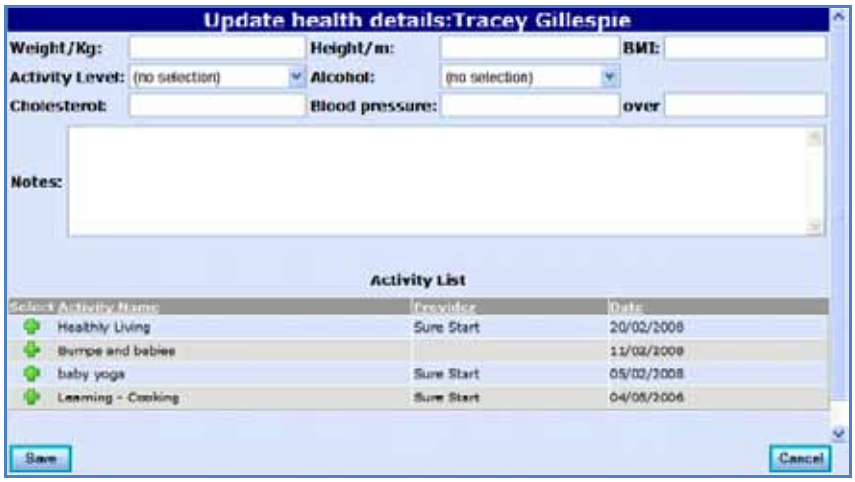


Figure 68 Health History | Add Contact | Update Health Details

Once all fields are completed this will be recorded against the individual's record.

Address and Languages

This option allows you to change just one individual's address; this would be used if the member is living elsewhere but has been registered with the family.

Using the left hand menu, choose the relevant member and then click on **Address & Languages**.

Figure 69 Changing the address for an individual

Enter the person's address details. You will now have added an address for the carer which is different to the family's address. You can also add in any different languages used by the carer on the right hand side.

Pregnancy

This is only available for female carers and is also displayed as part of the **Add Carer** screen.

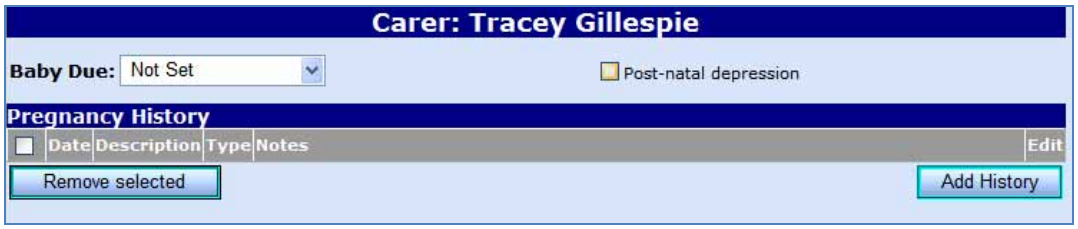


Figure 70 Pregnancy Details 1

Select the date when the baby is due. This will be highlighted on the family screen of a pregnant carer.

When you click **Save** a new button labelled **Baby Born** will now appear.

Figure 71 Pregnancy Details 2

When the carer has had the child, click this button to display a **Child Details** screen to add in the new child information.

If you wish to add details of this and previous pregnancies to the carer's record, click the **Add History** button and enter the details on the screen displayed:

Figure 72 Add Pregnancy History

The information will then be added to the Pregnancy Details screen.

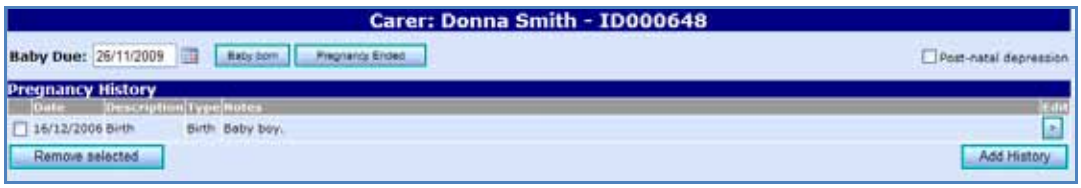


Figure 73 Pregnancy Details with history

Alternatively you can record the ending of a pregnancy by clicking the **Pregnancy Ended** button:

Figure 74 Pregnancy Ended Details

Child Record

Child Details

On the **Child Details** screen are displayed the child's basic details: ID, First name, Surname, Date of Birth, Primary Carer, Gender, Date Joined, Status, National Health Number, School, Ethnicity, Religion and Country of Birth and whether the child is Looked After.

You can also see any other Carers and a complete list of all Carers with Parental Responsibility for this child.

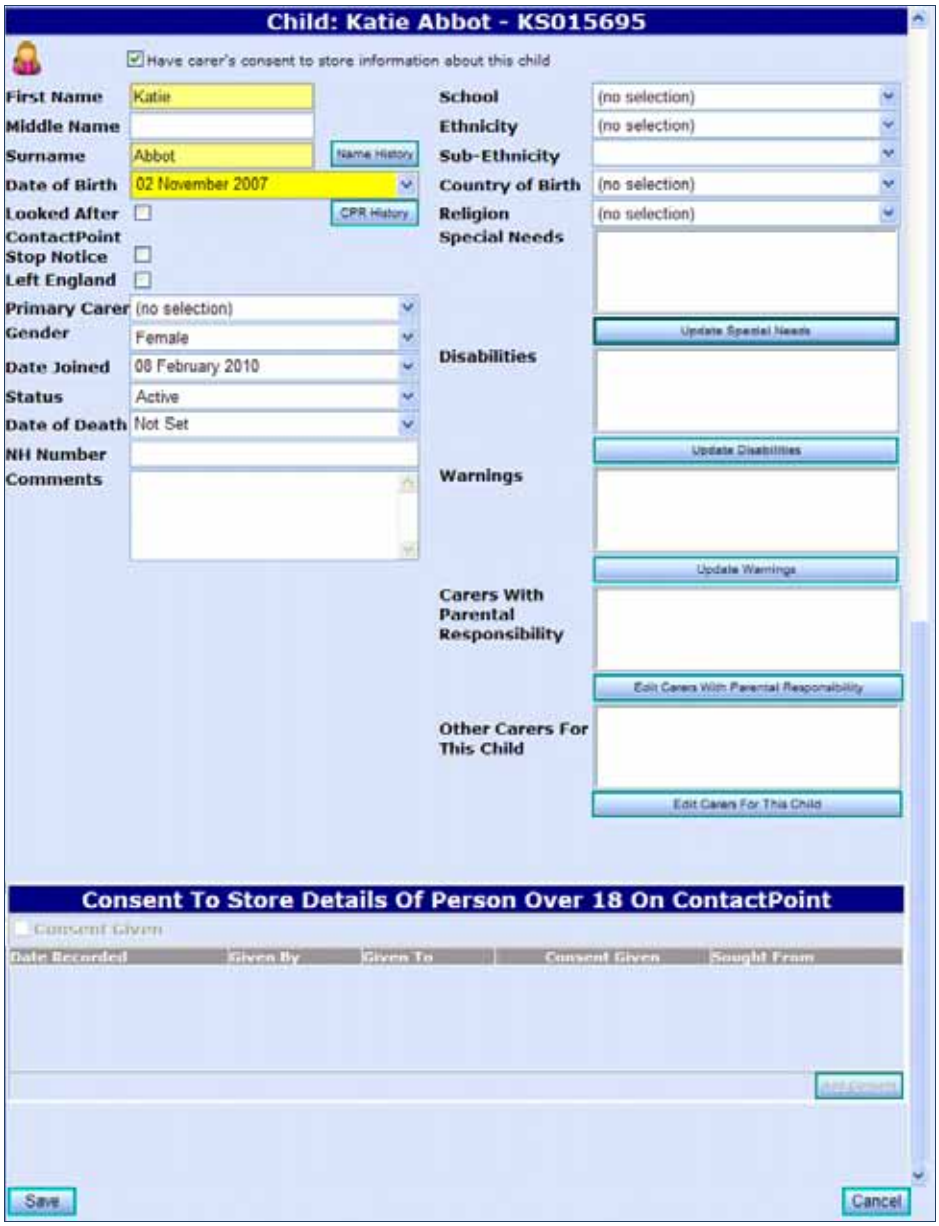


Figure 75 Child details screen

Most of these information fields are self explanatory and are only used within eStart however some of them have implications for ContactPoint (see also **ContactPoint Overview** on page 76).

If you want a child to be automatically included in eNurseries you must enter their **Date of Birth**. Neither the child nor their siblings will be available in eNurseries if this has not been entered and you might run the risk of duplicating them.

If the entry you need to choose is not in the lists of Special Needs, Disabilities and Warnings you will need to speak to an eStart Administrator who can add these in for you.

ContactPoint Stop Notice

If a child has a **Stop Notice** against them, no data will be sent to ContactPoint for this child. A Stop Notice can either be set manually by ticking the box on this screen, or can be automatically set by being included in an acknowledgement from ContactPoint. Anyone aged 18 or over will normally have a Stop Notice. Under certain circumstances a Stop Notice can be overridden. Please see the topic **Whose Records are sent to ContactPoint?** on page 77 for further details.

Left England

The **Left England** checkbox also relates to ContactPoint. Only children that live in England can have their details sent to ContactPoint. You should tick the **Left England** box if you know that the child has left England and does not intend to return within three years.

If an address has already been recorded for the child, if necessary you can tick this box even if you do not have their new address outside England. However if the box is already ticked (so indicating that the child lives outside England) and you enter a new address that is inside England you will be alerted of this.
Note that this checkbox is **not** linked to the **Outside England** box on the Address Details screen.

If a child has Left England ticked true, and their address has OutsideEngland ticked true, then ContactPoint will send a Stop notice to eStart to prevent the child being sent to them.

Children Returning to England

When ContactPoint receives notification that a child has left England, it will archive the child record, because it no longer has the legal authority to store the child's information. Therefore, if a child who has the **Left England** box ticked moves back into England, that child will need to be unarchived to restore their details onto ContactPoint. eStart cannot make a request to unarchive. Instead it is a manual process that is requested through the Local Authority ContactPoint Administrator.

Date of Death

You cannot save a Date of Death for a child unless their status has been set to inactive. For all "real" children, if they are inactive on the system (even if this is due to their death), it might still be necessary for information to be sent to ContactPoint. ContactPoint retains information on children that have died up to a year after the date of death.The only inactive records where information will not be sent to ContactPoint are those where the inactive reason indicates that they were added as a test, in error or are duplicates.

Carers

There are two lists of carers for a child - those with **Parental Responsibility** and **Other Carers for this child**. Anyone who has been added as a carer for the family will be listed in both edit list drop downs, however when you click on a name in one of the drop down lists to select them, they will disappear from the other list i.e. the two lists are mutually exclusive.

Carers with Parental Responsibility will have their name and contact details included in the information that is sent to ContactPoint.

Other Carers for this child might include, for example, an adult within the household who is the parent of other children within the same family but not of this child. Such people might be carers but would not necessarily have parental responsibility.

Consent to Store Details on ContactPoint

ContactPoint only has the legal authority to record information on children up to their 18th birthday. However there is an exception to this. With their consent, vulnerable young people can have their details recorded on ContactPoint up to their 25th birthday.

This is when it is believed that it would be in the young person's interest to retain their record on ContactPoint after reaching the age of 18 and requires informed and explicit consent from the individual, and also ensures that ContactPoint legal requirements (as defined in The Children Act 2004 Information Database (England) Regulations 2007) have been met. It also includes young persons accessing Connexions services (until their 19th birthday), as well as individuals who have been looked after children, or have learning difficulties, to assist with transition to adult services (until their 25th birthday).

To accommodate this, eStart allows this Consent to be recorded against a child. Access to this functionality is only allowed if the person is 17 or over. This allows the Consent to be stored before their 18th birthday so that there is no break in the information that is sent. As a result of this, the **Add Consent** button on the Carer Details screen will only be active for children aged between 17 and 24.

To complete consent details for ContactPoint for a child aged over 17, click the **Add Consent** button which is available on the Child and Carer Details screens. See **Adding Consent to Store Details of Person over 18 on ContactPoint** on page 35.

CPR History

CPR is an abbreviation of **Child Protection Register**. If you click on the **CPR History** button you will see the following:

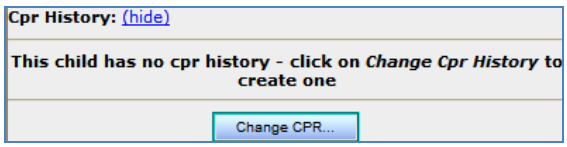


Figure 76 Child | Change CPR History

When you select **Change CPR** the following screen will be displayed:

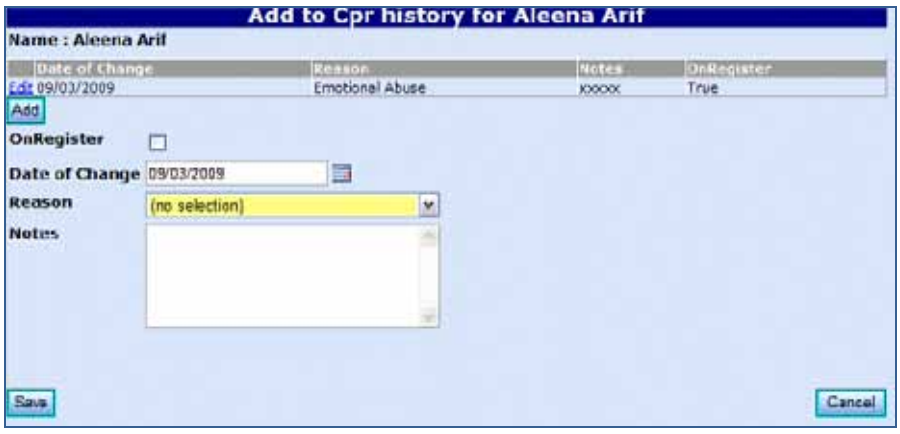


Figure 77 CPR History Details

The **On Register** tick box controls whether or not this information is visible on the Family screen. You can use this to indicate when a child is put on or taken off the register, including the date of the change, adding notes if necessary. A reason must be specified to ensure this is saved correctly.

Administrators can add in any additional reasons through the Admin section.

Child's Record - Additional Details

Figure 78 Children Menu Options

The menu on the left hand side can be used to add in more information on the child.
Many of the options have already been explained previously in the **Family** section.

Birth and Development

This monitors the child's development process from birth. In this section you can record Breastfeeding information, Speech & Language and Birth Details. Administrators can add in more Development Plans (and their associated details) and Birth Locations through the Admin section.

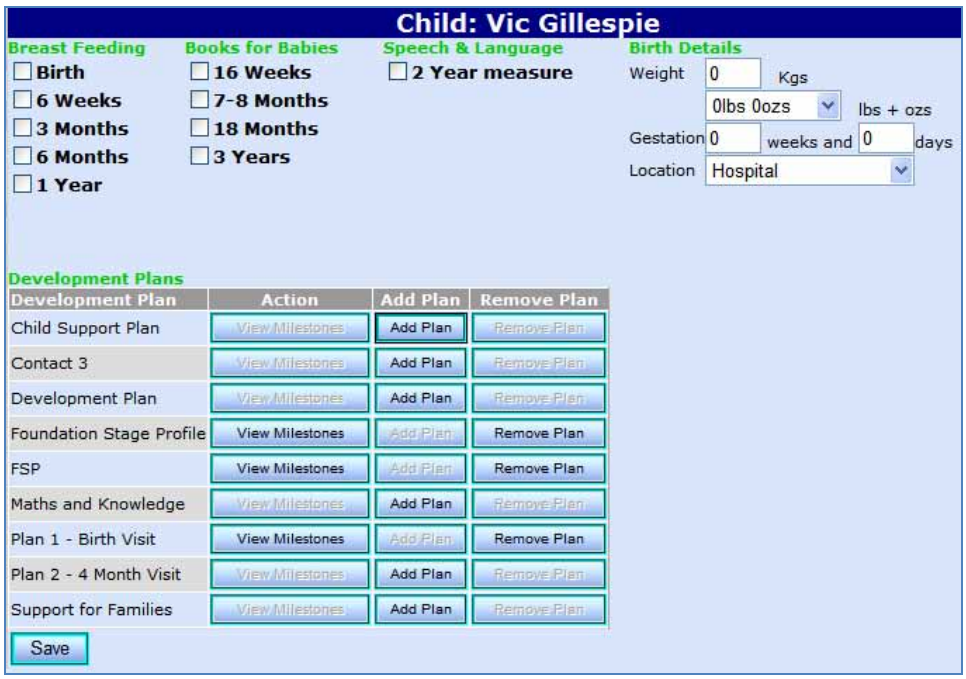

Child: Vic Gillespie
Breast Feeding
Birth
6 Weeks
3 Months
6 Months
1 Year
Books for Babies
16 Weeks
7-8 Months
18 Months
3 Years
Speech & Language
2 Year measure
Birth Details
Weight 0 Kgs
0lbs 0ozs lbs + ozs
Gestation 0 weeks and 0 days
Location Hospital
Development Plans
Development Plan | Action | Add Plan | Remove Plan
Child Support Plan | View Milestones | Add Plan | Remove Plan
Contact 3 | View Milestones | Add Plan | Remove Plan
Development Plan | View Milestones | Add Plan | Remove Plan
Foundation Stage Profile | View Milestones | Add Plan | Remove Plan
FSP | View Milestones | Add Plan | Remove Plan
Maths and Knowledge | View Milestones | Add Plan | Remove Plan
Plan 1 - Birth Visit | View Milestones | Add Plan | Remove Plan
Plan 2 - 4 Month Visit | View Milestones | Add Plan | Remove Plan
Support for Families | View Milestones | Add Plan | Remove Plan
Save

Figure 79 Child Development screen

Referrals

In this section, a carer or child can be referred to a certain event by a care worker; they should choose the relevant setting and the event type.

Referrals are accessed in the tree view under the node for the relevant child or carer within the current family.

Figure 80 Referral node

Clicking on **Referrals** will bring up a screen which lets you view or edit existing referrals or create new ones.

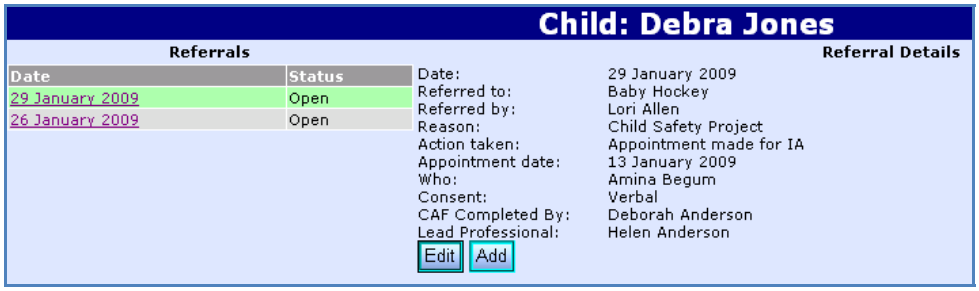


Figure 81 Referrals screen

A summary of the highlighted referral appears on the left. To highlight a different referral, simply click on the relevant referral's date in the date column.

To edit the selected referral, click the **Edit** button. To add a new referral, click the **Add** button.

When you click the **Edit** or **Add** button the **Referral and Case Management** screen will be displayed.

Figure 82 Referrals Case Management

To add or edit a referral simply complete the fields with the relevant entries and click **Save**.

Please note: The **Event** drop down box will only be populated once you have made a selection from the **Referred to** drop down box. Once you select the relevant setting in the **Referred to** box, the events held by that setting will become available in the **Event** drop down box.

For date selection boxes you can either manually type in the date in the format dd/mm/yyyy or click on the calendar icon to expand the calendar and select the date by clicking on it.

Figure 83 Date selection calendar option

Monitoring eStart Use

Monitoring eStart Use

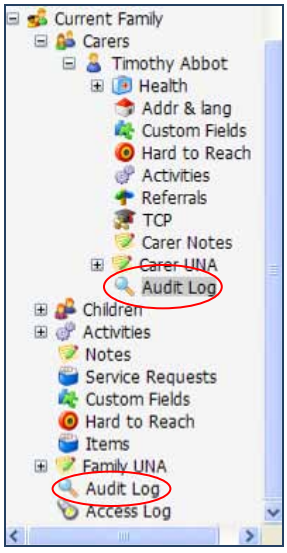
The **Access and Audit Logs** within eStart allow you to see who has viewed or made changes to a particular person or family record within a selected date range and also to see exactly which items within a record were changed.

You will only be able to view these screens if you have been given the correct permissions to do so. By default only Console Managers will have access to the Audit and Access Logs, but they can give permission for other users to view them through the usual permissions route.

⚠ In order for the logs to display the correct information it is important that the web server date and time are accurate as these will be used for the date and time of the log records.

Audit Log

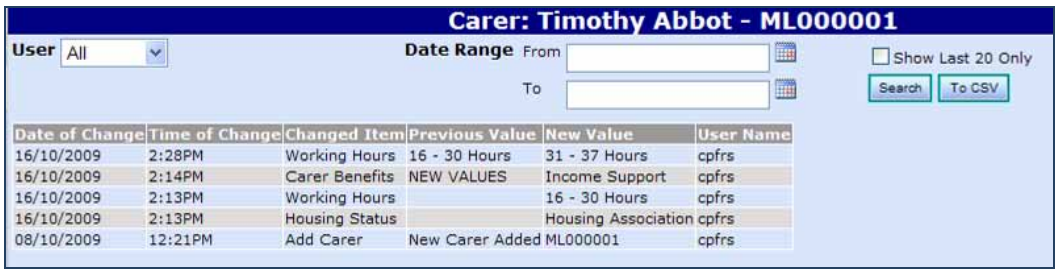
The Audit Log tracks all changes made to a record i.e. Carer and Child basic details, health data, custom fields, hard to reach, activities, referrals, and TCP attendance. For Family records, it also records changes made to activities, service requests, custom fields, hard to reach and items.



To view the Audit Log for a family (if you have the correct permissions), click on the + next to Current Family to open the menu, then click on **Audit Log**.

Similarly for a person (Carer or Child), click the + next to their name to open the menu, then click on **Audit Log**.

When you click on **Audit Log**, a screen similar to that shown below is displayed:



Date of Change	Time of Change	Changed Item	Previous Value	New Value	User Name
16/10/2009	2:28PM	Working Hours	16 - 30 Hours	31 - 37 Hours	cpfrs
16/10/2009	2:14PM	Carer Benefits	NEW VALUES	Income Support	cpfrs
16/10/2009	2:13PM	Working Hours		16 - 30 Hours	cpfrs
16/10/2009	2:13PM	Housing Status		Housing Association	cpfrs
08/10/2009	12:21PM	Add Carer	New Carer Added	ML000001	cpfrs

Figure 84 Audit Log (Carer)

There is a line for every piece of information that has been added or changed. For each line the following information is recorded:

1. The date and time of the change (based on your web server's date and time)
2. The actual item (field) that was changed
3. The previous value (if one existed)
4. The new value
5. The user name of the person who made the change

The oldest line of information will be when the person was added to eStart (if this was after the implementation of the Audit Log - see warning note below).

⚠ It is important to note that only information that has been added or changed since the Audit Log functionality was implemented in eStart v3.37 will be listed. No earlier information will be included in the Audit Log.

You can limit the results to list only those changes made within a certain date range and you can also choose to only show the last twenty records. If you choose or change either of these filter options then you will need to click the **Search** button to display the list of results.

The **To CSV** button allows you to download the list to Excel and either open it or save it e.g. as an Excel spreadsheet. Make sure you give the file a suitably descriptive filename when you save it.

File Download
Do you want to open or save this file?
Name: eStart_data.csv
Type: Microsoft Office Excel Comma Separated Values Fil...
From: www.estartsecure.com
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Figure 85 Export Audit Log to CSV

Changes are listed in the same way in the **Child** Audit Log:

Child: Katie Abbot
User All
Date Range From
To
Show Last 20 Only
Search
To CSV
Date of Change | Time of Change | Changed Item | Previous Value | New Value | User Name
16/10/2009 | 2:22PM | Child Disabilities | NEW VALUES | D3 Deaf / Hearing Impairment | cpfrs
16/10/2009 | 2:22PM | childcarersidIndex | | ML000001 | cpfrs
08/10/2009 | 12:22PM | Add Child | New Child Added | ML000002 | cpfrs

Figure 86 Audit Log (Child)

And the **Family** Audit Log:

Family
User All
Date Range From
To
Show Last 20 Only
Search
To CSV
Date of Change | Time of Change | Changed Item | Previous Value | New Value | User Name
19/10/2009 | 2:00PM | Family HardToReach | Family living in poverty--False | Family living in poverty--True | cpfrs
08/10/2009 | 12:20PM | Add Family | New Family Added | ML000001 | cpfrs

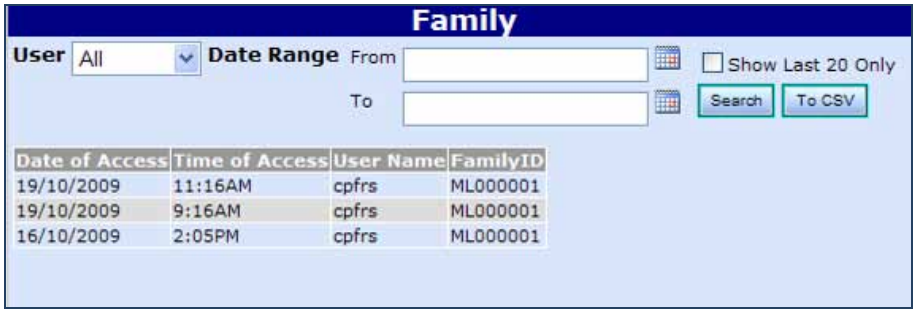
Figure 87 Audit Log (Family)

Access Log

The Access Log displays a log of all attempts made to access a **Family** record (not an individual record).

To view the Access Log for a family, click on the + next to Current Family to open the menu, then click on **Access Log**.

When you click on **Access Log**, a screen similar to that shown below is displayed:



There is a line of information for each access attempt. For each line the following information is recorded:

1. The date and time of the access (based on your web server's date and time)
2. The user name of the person who accessed the record
3. The ID of the family whose record was accessed

⚠ It is important to note that only access attempts made after the Access Log functionality was implemented in eStart v3.37 will be listed. No earlier information will be included in the Access Log.

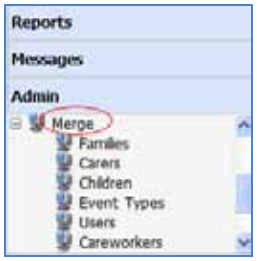
You can limit the results to list only those access attempts made within a certain date range and you can also choose to only show the last twenty records. If you choose or change either of these then you will need to click the **Search** button to create the list of results.

The **To CSV** button allows you to download the list to Excel and either open it or save it e.g. as an Excel spreadsheet. Make sure you give the file a suitably descriptive filename when you save it.

Merging and Moving

Merging and Moving

Use the merge function to merge Families, Carers, Children, Event Types, Users, Care workers or Doctors, or to move carers and children from one family to another.



Select **Admin** in the left hand menu and click the **Merge** option.

Figure 88 Admin | Merge

Now select what you wish to merge. If, for example, you wish to merge Families, select this from the left hand side menu by clicking on it. You will now see the screen below:

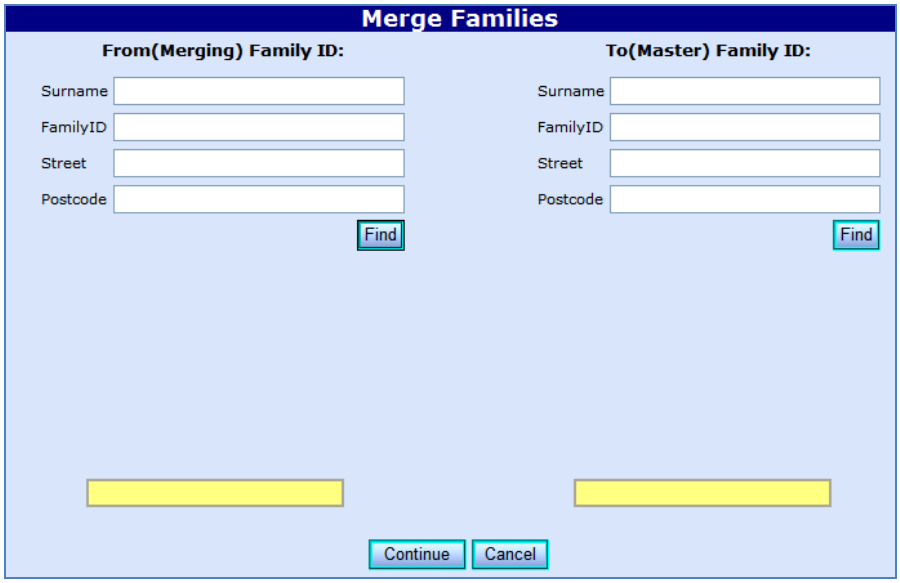


Figure 89 Merge Families screen

Now select the family you wish to merge **from** by searching for it. You can search using Surname, Family ID, Street, or Postcode.

Click **Find** to display the results:

Figure 90 From (Merging) Family search results displayed

Select a record from the list of results displayed, by clicking on it. You will notice the record's **Family ID** is now displayed in the yellow box below.

Figure 91 Selected Merging Family's ID displayed

You will now need to repeat the same process for the family you wish to merge **to**.

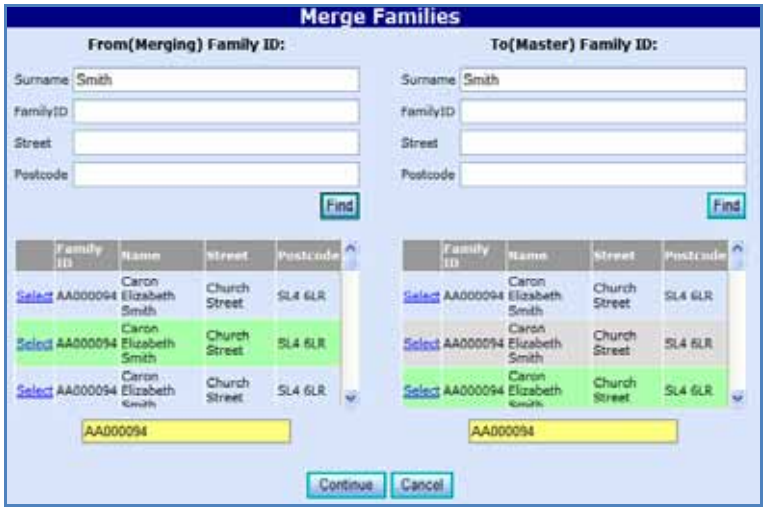


Figure 92 Merging and Master Families both selected

Now select **Continue**.

The next screen will confirm the merge and ask who you wish to transfer from one family in to the other.

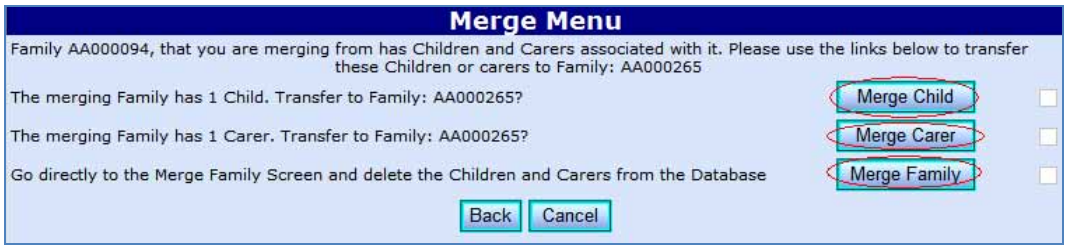

Merge Menu
Family AA000094, that you are merging from has Children and Carers associated with it. Please use the links below to transfer these Children or carers to Family: AA000265
The merging Family has 1 Child. Transfer to Family: AA000265?
Merge Child
The merging Family has 1 Carer. Transfer to Family: AA000265?
Merge Carer
Go directly to the Merge Family Screen and delete the Children and Carers from the Database
Merge Family
Back
Cancel

Figure 93 Merge Menu - Select People to transfer

To avid duplicates, you are advised to choose **Merge Carer** and then **Merge Children** before Merging this Family. This is so that all essential data can be passed across first.

You can click and drag a carer from the left to the right; this moves the carer to the new Family ID.

By placing the individuals in the box below (middle) this will merge the members together. You are asked to choose which items of data you wish to keep or remove.

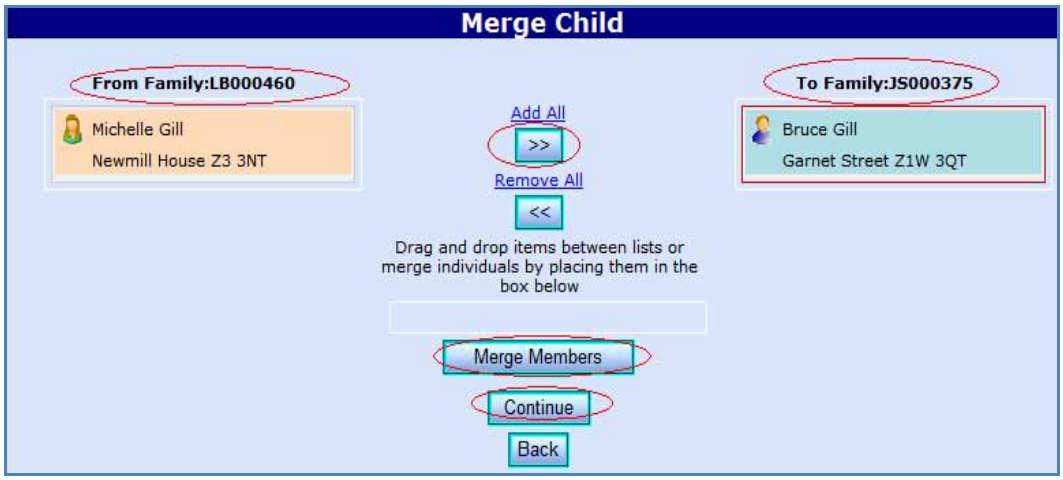


Figure 94 Merge Menu - Select Data Items

Select the fields you wish to merge by ticking the checkboxes (under the Select menu).

Now choose a reason for the merge and select **Merge** (see below).

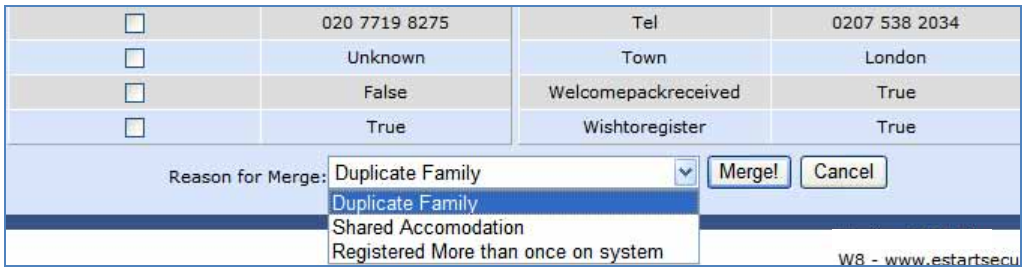


Figure 95 Selecting a reason for the family merge

The final merge to perform is the **Merge Family** option; this removes the old Family ID and keeps the new ID on the system.

If the merge completes successfully the following message is displayed. Click on **Done**.

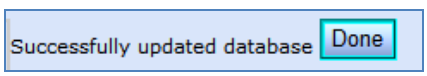


Figure 73 Merge successfully completed and database updated

Events

Events Section

The **Events** section of eStart allows you to enter the details of a new Event and add **Attendees** (for an event in the past) or **Registrants** (for an event in the future) to an event. To access Events you can click on either **Events** from the left-hand menu or click on **Manage Events** from the Home page.

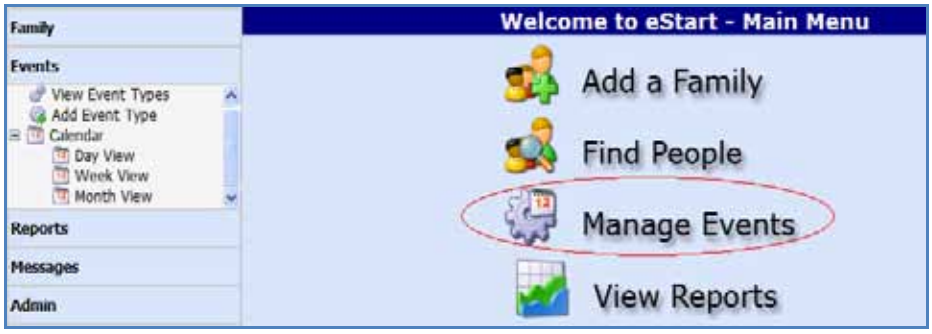


Figure 96 Manage Events

To create a new event, click **Add Event Type.** You are now presented with a blank form to complete with all the data for this event.

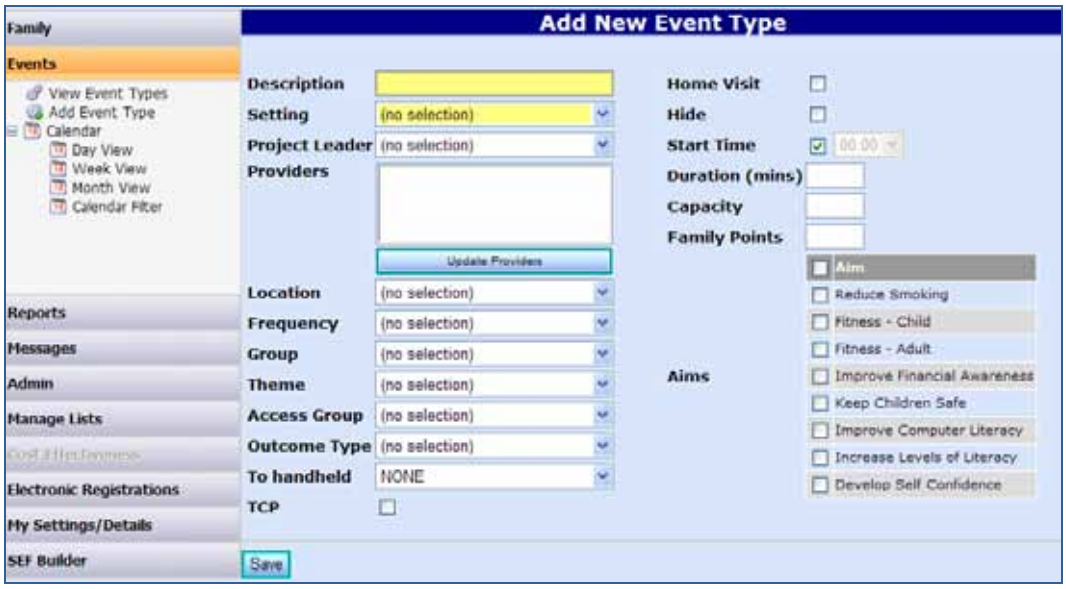


Figure 97 Add New Event Type

Enter the information for this event on the Event Details screen, selecting entries from the drop downs where they are provided. You must enter at least a Description and a Setting.

To add Providers you must first select a Setting. Then, click on the **Update Providers** button to open a list of all Event Providers for the Setting you have chosen. Click on the Provider(s) to add them to the list for this event in the upper box, then click on **Update Providers** again to close the lower box.

Administrators can add in all dropdown fields and providers through the Admin section.

Event Details

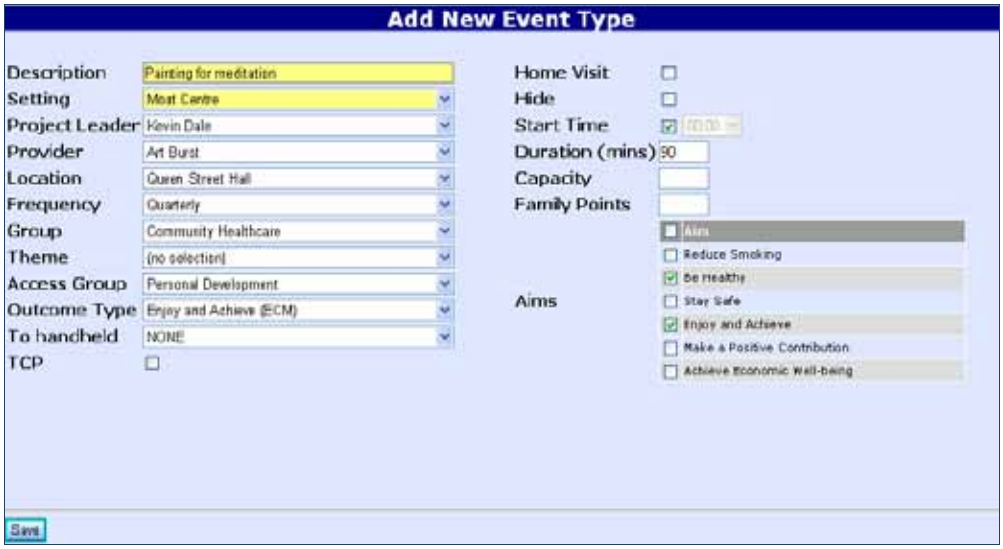


Figure 98 Event Details

The description and setting fields are mandatory, all others are optional. You can tick the TCP checkbox to identify the event as part of a TCP course (See the TCP section for more information on this) and/or assign aims to the event.

Once the data has been entered and saved, select **Add Date** from the left-hand menu.

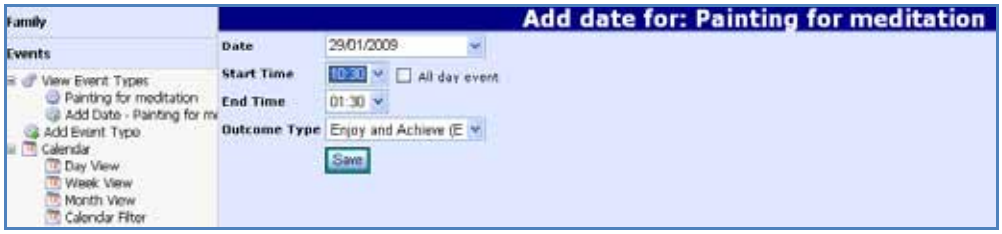


Figure 99 Adding a date for an event

You can input a date in the future; this will allow you to register members for the event (these are "Registrants").

If this is a date in the past, this screen will be displayed:

Figure 100 Past Events screen

The **Duplicate** option allows you to repeat the same event if this occurs frequently, this will save time by not having to add a new event each time. See **Event Recurrence** for further details.

The results and From/To options let you narrow down the event dates displayed to only those between specific dates and / or the top number of results.

Event Register

The Print button opens the **Event Register**. This is a Crystal report listing all the registrants for the event including their Family ID, Type, Age (children) and Postcode, and indicating whether or not they actually attended. Use the Crystal toolbar to export, print, change page or search the results. See **Report Toolbar** on page 114.

Event Attendees/Registrants

Click on **Attendees** (for events in the past) or **Registrants** (for events in the future) to add in all members for the event. A **Search** screen with three tabs is displayed:

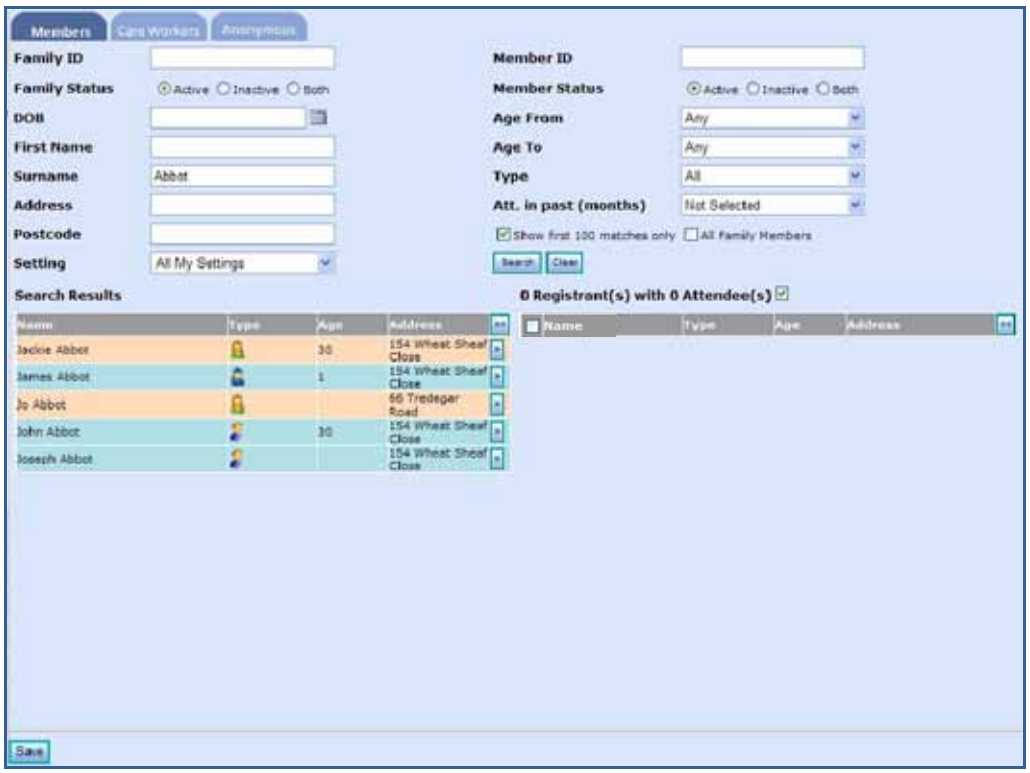


Figure 101 Search for Attendees or Registrants to add to an Event

Enter your search criteria and click the **Search** button. When you obtain the relevant results, select the name(s) by clicking the > button. You can then use the tick boxes against the names in the right hand box to select them for the event. Ticking the box in the header bar will select all the names.

Now select a **Care worker** for this event; they are selected in the same way as above by clicking on the > button next to the Care Worker's name.

Please Note: Only Care Workers associated with the selected setting will appear in the list.

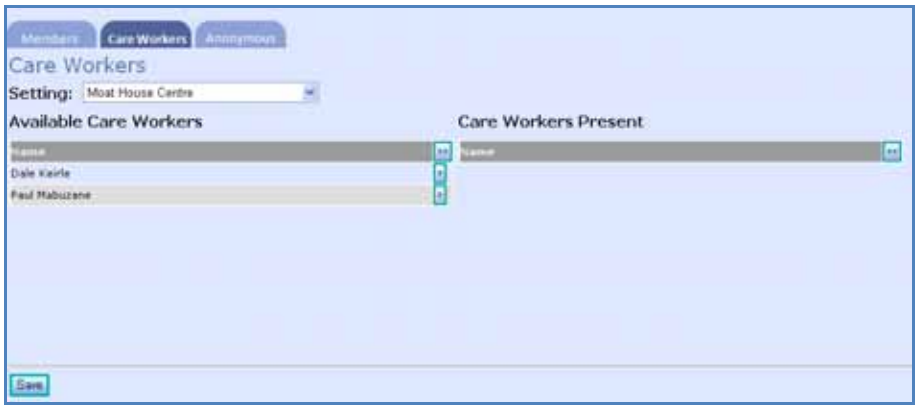


Figure 102 Search for Care Workers to add to an Event

Click on **Save** and the confirmation will be displayed:

Figure 103 Save confirmation

During the process of saving the names, eStart will check to see whether or not the attendees/registrants are either registered or affiliated to the event or course's setting on the date of the event (or the dates of all course meetings). If they are not, they will now have a icon in the Type column. Information about these people and their link with the setting will not automatically be sent to ContactPoint. If you wish information about children and young people who have been added to an event to be sent to ContactPoint as an involvement, you will need to affiliate them to the setting through their Family screen, ensuring that the **Send to ContactPoint** box is ticked in the Involvement Details (opened by clicking on the Registration and Affiliation Details button). See the topic **Registration and Affiliation Details** on page 18 for more information.

You can also add in **Anonymous Members** (who don't wish their name to be disclosed or who aren't registered at a Children's Centre). Enter the numbers of anonymous members for each category and click **Save**.

Figure 104 Search for Anonymous Members to add to an Event

If you click on the event name in the left hand menu, you will see this has been updated to reflect the **number of attendees/registrants**.

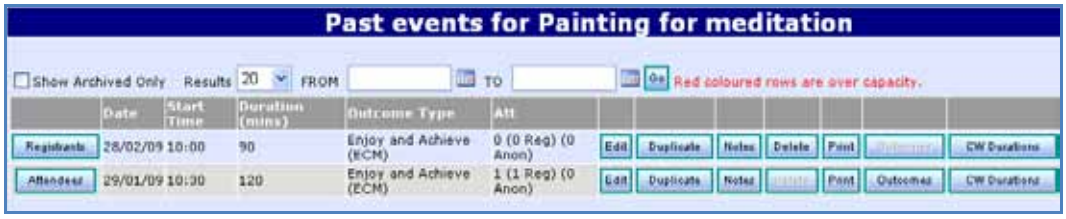


Figure 105 Attendees/Registrants, Outcomes, and CW Durations

CW Durations will display a breakdown of the length of time spent by the Care Worker for each stage of the event.

Figure 106 Care Worker duration breakdown

Event Outcomes

You can also select **Outcomes** for this event. Click the **Outcomes** button against the event then select the relevant **outcome** and **outcome type** and **apply** to the attendee.

If there is more than one outcome applicable then this can be done by selecting the **Edit** button under **Multiple Outcomes**

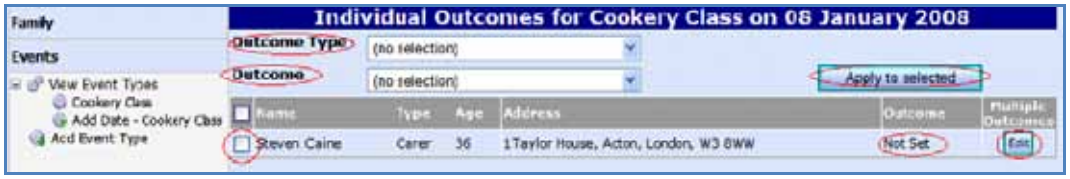


Figure 107 Outcomes Screen

View Event Types

Now click on **View Event Types** from the left hand menu. You will see all events at the Children's Centre; the event will have **one date** stored on the system.

Event Satisfaction Ratings

You can add **Satisfaction Ratings** for the events - click the **Satisfaction** button:

Figure 108 Event Type List

The Satisfaction Rating descriptions and order can be changed by an Administrator.

You will need to select the **Feedback Rating** the user has given to this event and apply it to the satisfaction rating.

Figure 109 Satisfaction Ratings Screen

Outcomes Summary

The **Outcomes Summary** will provide the overall view of the event:

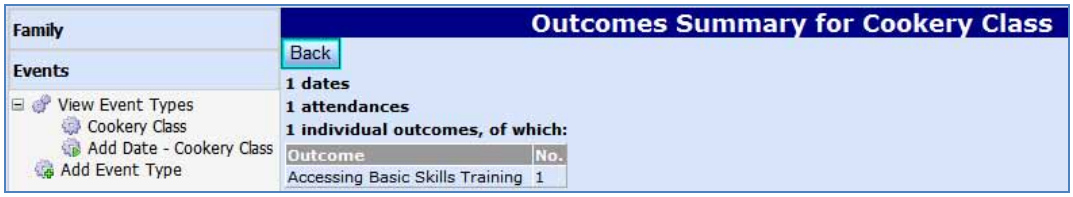


Figure 110 Outcome Summary for an Event

You have now successfully added an event.

Favourites

When viewing the Event Type List you can filter by the letters that the event starts with or by Favourites. The screen will automatically default to Favourites. You can add or remove any event from your favourites by checking or un-checking the **Add to Fav.** checkbox on the right hand side and clicking the **Save Favourites** button.

Figure 111 Events Favourites

Events Calendar

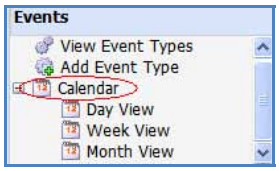


Figure 112 Events Calendar Options

The **Events Calendar** displays all events that are scheduled for a particular Day, Week or Month. When accessing each view you can click on the word **Key** at the top left on the screen, which will display a list identifying at which Children's Centre / Setting each event is scheduled to run.

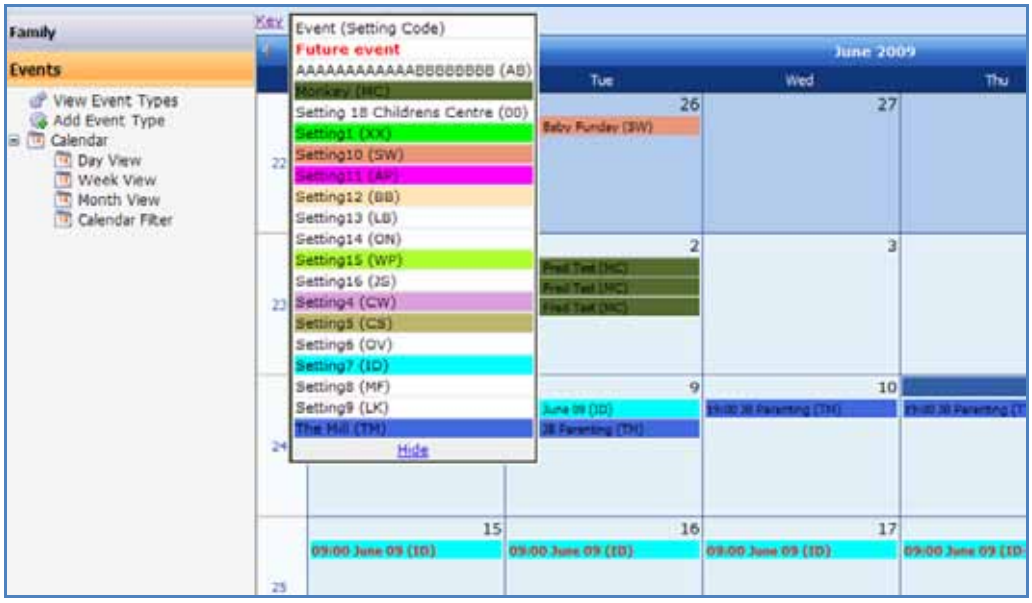


Figure 113 Events Setting Codes

There is also a **Help** link at the top right of the screen, which describes an option to make any amendments to the current display:

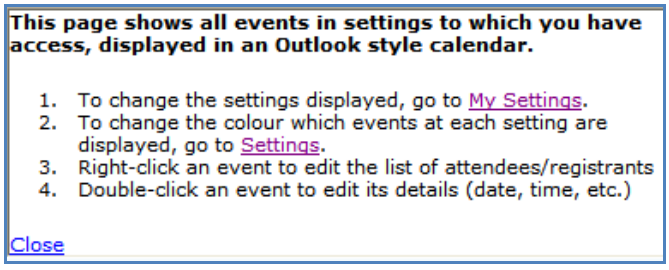

This page shows all events in settings to which you have access, displayed in an Outlook style calendar.
1. To change the settings displayed, go to My Settings.
2. To change the colour which events at each setting are displayed, go to Settings.
3. Right-click an event to edit the list of attendees/registrants
4. Double-click an event to edit its details (date, time, etc.)
Close

Figure 114 Help Option

Day View

This displays all events which are schedule to run for the current day. You can select different days by using the arrows on the left and right of the screen or the **Change Date** option at the top.

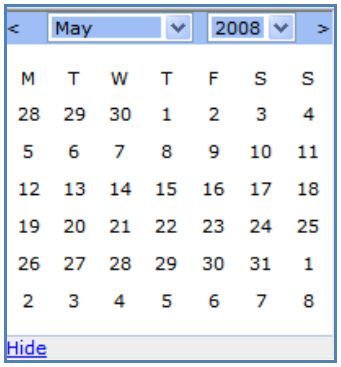


Figure 115 Calendar

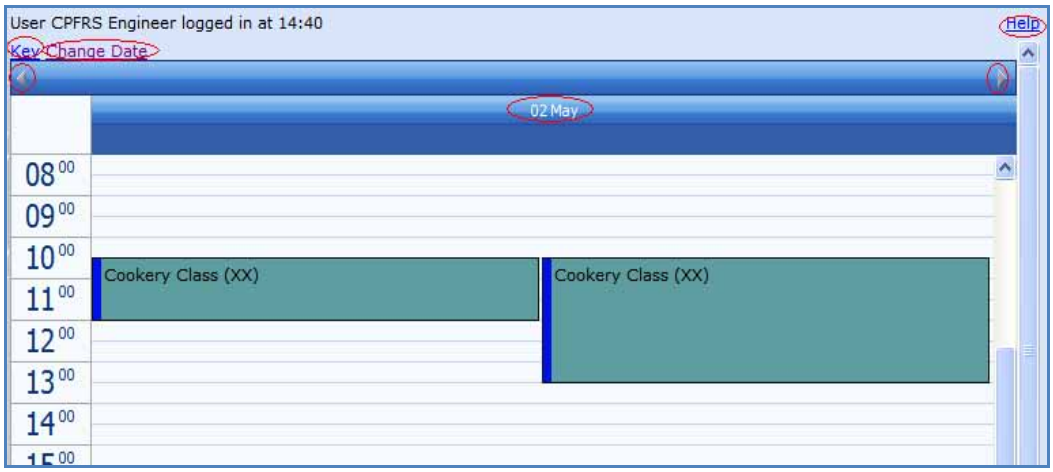


Figure 116 Events Day View

Week View

This will display all the events with Monday being the start of each week

28 April - 4 May
28 April
08:00 - 09:00 Baby Yoga @WWC (SW)
01 May
08:00 - 09:00 Ante Natal/Post Natal (SW)
10:30 - 11:30 Cookery Class (XX)
29 April
08:00 - 09:00 Test Goal (XX)
15:00 - 16:00 Salsa for 2yr olds (WP)
02 May
10:30 - 12:00 Cookery Class (XX)
10:30 - 13:30 Cookery Class (XX)
30 April
13:00 - 15:00 Ante Natal/Post Natal (SW)
03 May
04 May

Figure 117 Events Week View

Month View

This displays all events scheduled for the Children's Centre for the month.

Figure 118 Events Month View

Event Recurrence

To create a recurring event click the **Duplicate** button against the event.

Figure 119 Past events view screen

You will now be in the edit event (Duplicate Date) screen - see Figure 120 below. Click on the **Recurrence** button.

Note: The details of start time, end time and outcome type, will be carried over for all the events created.

Figure 120 Duplicate events screen

The screen will now change to this:

Figure 121 Duplicate Event Dates

There are numerous options here to set up recurrences of this event; the page will generate a list of event dates for you, based on the start date and number of days that you select.

Figure 122 Duplicate Event Dates Populated

You have the option to include weekends (not selected by default), but can also then manually add or remove dates. When adding a new date, simply select the date in the calendar and click the 'Add' button.

Here, we have removed 'Wednesday, 03/12/2008' and added 'Monday, 08/12/2008' using the Add and Delete buttons and the calendar control.

Figure 123 Adding and Deleting Duplicate Event Dates

You can also choose whether to duplicate the registrants for these events or not. The Registrants check box (ticked by default) can be used for changing this.

Manage Lists

Manage Lists

Manage Lists allows users to conduct searches on family data and so generate lists of names. These can then be used to send emails or text messages, to create mail shots etc. or can be exported, e.g. to an Excel spreadsheet or XML file.

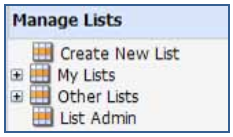


Figure 124 Manage Lists

There are two ways of sending messages (Emails and Text Messages) from eStart.

- If you wish to contact non-eStart users (for example parents) or a pre-defined list of eStart users then you need to use the Export function within Manage Lists
- If you wish to contact eStart users (e.g. Careworkers), the Messages function allows you to create and send emails and SMS/Text messages through the eStart database without creating a list first - see page 72 onwards.

The **Manage Lists** functions are described below.

Create New List

Click on **Manage Lists**, then **Create New List**.

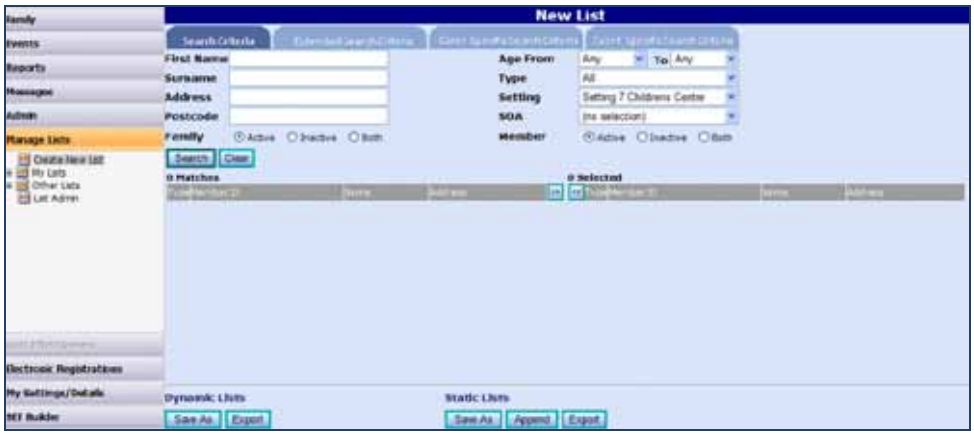


Figure 125 Create New List screen

You need to enter some criteria on which your list will be based. Once you have entered the criteria and searched, a list of all names recorded on the system that meet those criteria will be displayed. You can then select names from that initial list to create your final list.

The more criteria you use and the more details you enter into the criteria, the closer your search will be narrowed down and the fewer results will be generated. There are four tabs listing the search criteria, each with a **Clear** button to remove any entries you have made. The **Clear** buttons will only clear the entries for the tab you are currently on.

If you have made a lot of selections on several tabs and need to start again, the quickest way to clear all the entries and start again with a blank form will probably be to select **Create New List** again from the left hand menu, rather than to go into each tab and click **Clear** for each one.

Search Criteria tab

These are the basic person details fields such as First Name, Surname, Address, Postcode, Family, Age From, Age To, Type, Setting (this will default to the default setting saved in My Settings/Details), Super Output Area (SOA) and Member ID.

The Settings available are those to which you have access. The SOA dropdown is linked to the Setting dropdown, such that if a Setting has been selected, the list of SOAs available will be restricted to those that are linked to the Setting chosen. If you select the dropdown for SOA without having first selected a Setting then the list of SOAs available will be a full list of all the SOAs for the group of Settings to which you have access.

Extended Search Criteria tab

These criteria include Family ID, Ethnicity, Member ID, Religion, Gender, Nationality, GP, Centre Health Visitor and Family Health Visitor. By using these you can create mailing lists which target the clients of e.g. specific GPs or Health Visitors.

Carer-Specific Search Criteria tab

The search can be further extended to include Carer details such as Principle Carer, Correspondent, Pregnant status and Lone Parent.

Event-Specific Search Criteria tab

Members in the list can also be searched depending on their membership of a Setting, Events, Date Range, Outcome Type, Outcome, Group, Theme, Access Group, Provider and Location.

Enter or select the criteria from which you wish to create your list and click on the **Search** button. All the people who are recorded in the system who meet the criteria will now be listed in the **Matches** column on the left hand side of the screen.

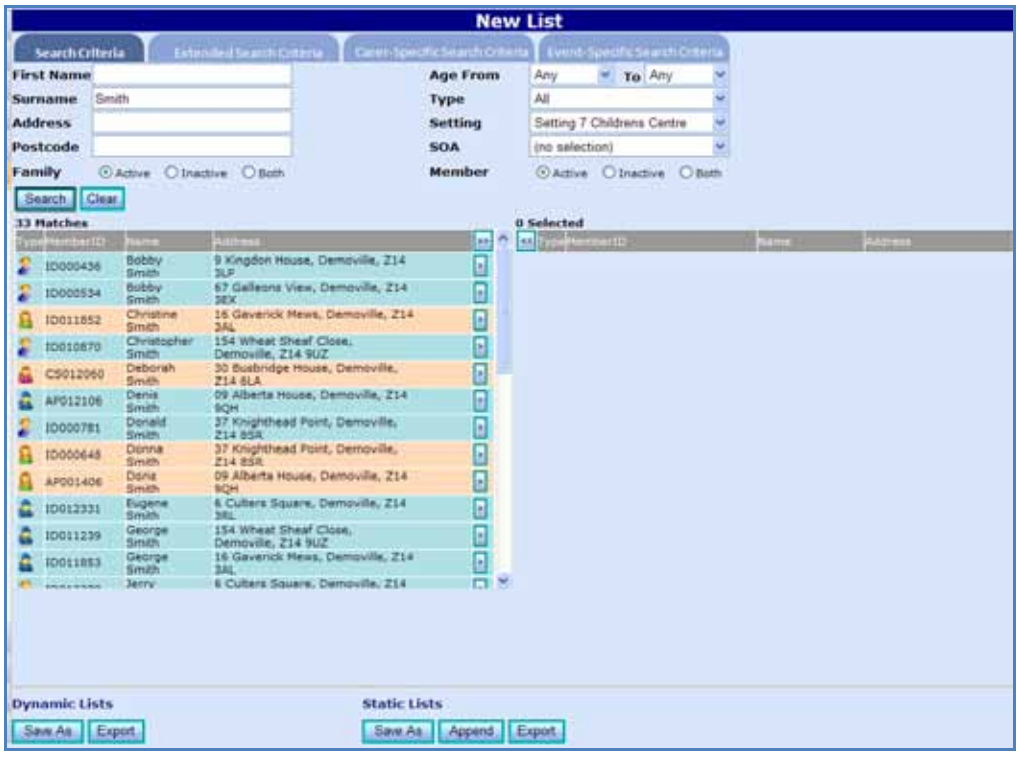


Figure 126 New List screen with Matches

Lists can either be **Static** or **Dynamic**:

- **Static lists** are those in which the list of **Selected** names is saved but the search criteria are **not** saved. The list saved is that on the right hand side of the screen.
- **Dynamic lists** (*) are those in which the list of **Matches** on the left hand side of the screen is saved, along with the search criteria.

A Dynamic list can be distinguished from a Static list by (*) in front of the list name. A Dynamic List can be saved as either **Public** or **Private**. The two types of list are saved slightly differently - see below.

Saving and Exporting a Static List

If this is to be a **Static List**, you can now click on the Move All >> or > Move buttons to move the names you want to be in your list over to the right hand side, into the **Selected** list:

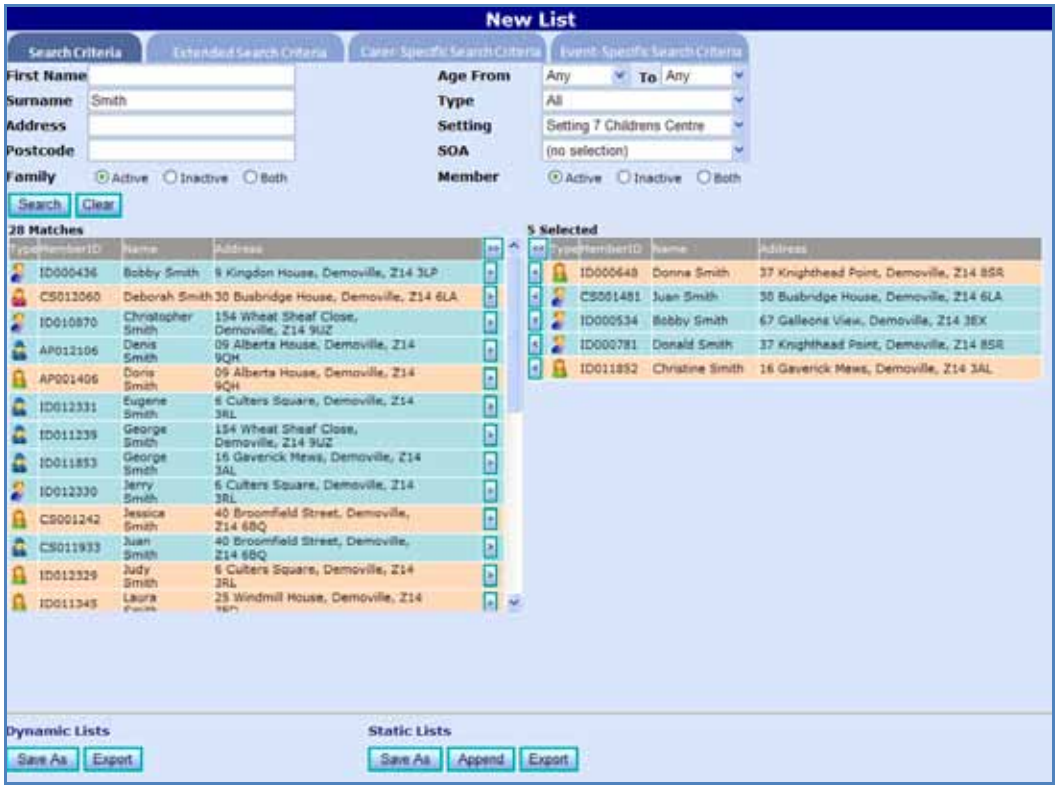


Figure 127 New List screen with Matches Selected

You can now save your list as a **Static List** by clicking the Static Lists **Save As** button, at which point you will need to give the list a name so that you can easily select it again in the future if necessary. You can also **Append** or **Export** it.

Saving and Exporting a Dynamic List

For a **Dynamic List**, instead of moving the results to the right hand **Selected** list, you should save or export the list directly from the left hand **Matches** list by clicking the Dynamic Lists **Save as** or **Export** button.

This is because Dynamic lists are continually changing. If you save your search results as a Dynamic list, the list will update itself using the live data on the system every time the list is opened. You should not move the search results to the right hand side since this is for Static lists that must be manually updated. If you do so then try to save the results as a Dynamic List, you will receive an error message.

Public and Private Lists

Dynamic Lists can be Public or Private.

Figure 128 Public or Private dynamic list

A Public List:

- Can be viewed by all users
- Can can only be **changed** by the user who created it

A Private list:

- Can only be **viewed** by the user who created it
- Can only be **changed** by the user who created it

Save List

The **Save** button is only available when you are viewing a previously created list. It allows you to make changes to the list and save it with the same name. If you wish to save a changed list as a new list, you must use the **Save As** button.

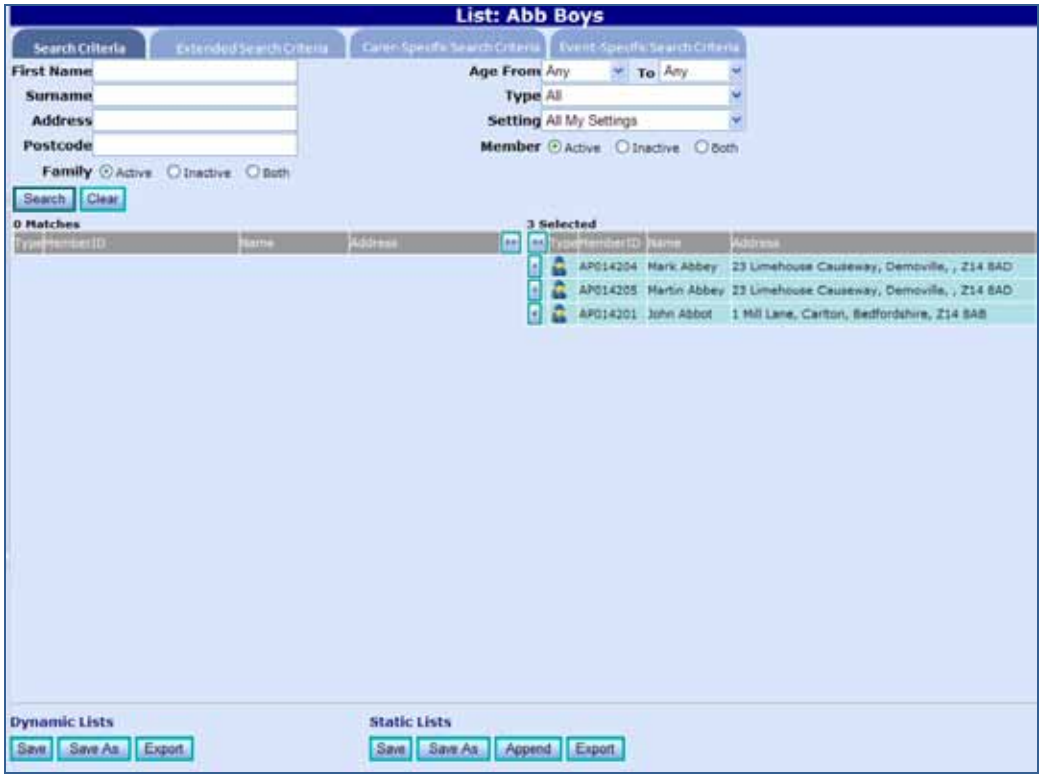


Figure 129 Viewing a previously saved static list

Append

The **Append** function allows you to add to an already existing list - for example you may have created a list in the past that you now wish to add extra members to.

Assuming you have run a search and have selected your members, you will now need to click on **Append**. You now need to select the existing list to which you wish to append the selected members.

Click on **OK** when you have made your selection.

Figure 130 List for appending members.

The selected members will now be added to your chosen list and this list can be retrieved at any time by selecting **Other Lists**.

Export

Once you are happy with the list you have produced you can then go on to save it, export it to a Microsoft application such as Excel or create Mail Shots.

Click on the Export button under Dynamic or Static Lists.

Figure 131 Export type dropdown.

Mail Shot

Select Mail Shot. The **Select Mail Merge Type** screen will be displayed.

The Type dropdown allows you to choose to use the selected list for Mailing Label, Email and Text Message and can be merged to This (selected) List, Main Carer or Main Correspondent.

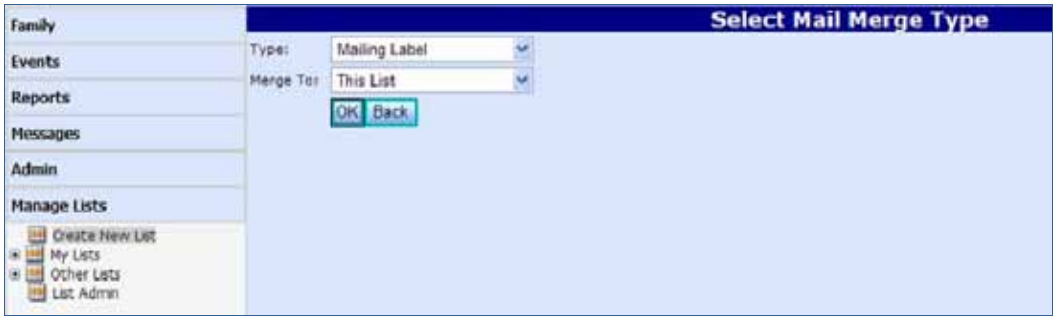


Figure 132 Mail Merge Type Screen

It is important to note that Main Carers and Correspondents are not necessarily the same - a Main Carer must be selected as a **Primary Carer** on a child's record and a Correspondent must have the **Send Correspondence** box ticked on their record.

Mailing Label

Set the Type to **Mailing Label**, select Merge to **This List** and click **OK**.

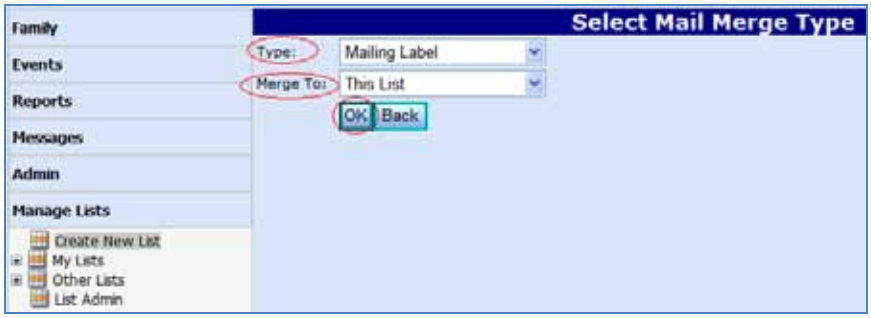


Figure 133 Selecting Mailing Label

You now need to choose a label type; you can select one of two sizes, L7163 or L7160. Now click on **OK**.
You will be presented with an option to **Open** or **Save.** You can select either option depending on what you want to do.

Figure 134 File Download dialog

Clicking on **Open** will allow you to view the mail shot:

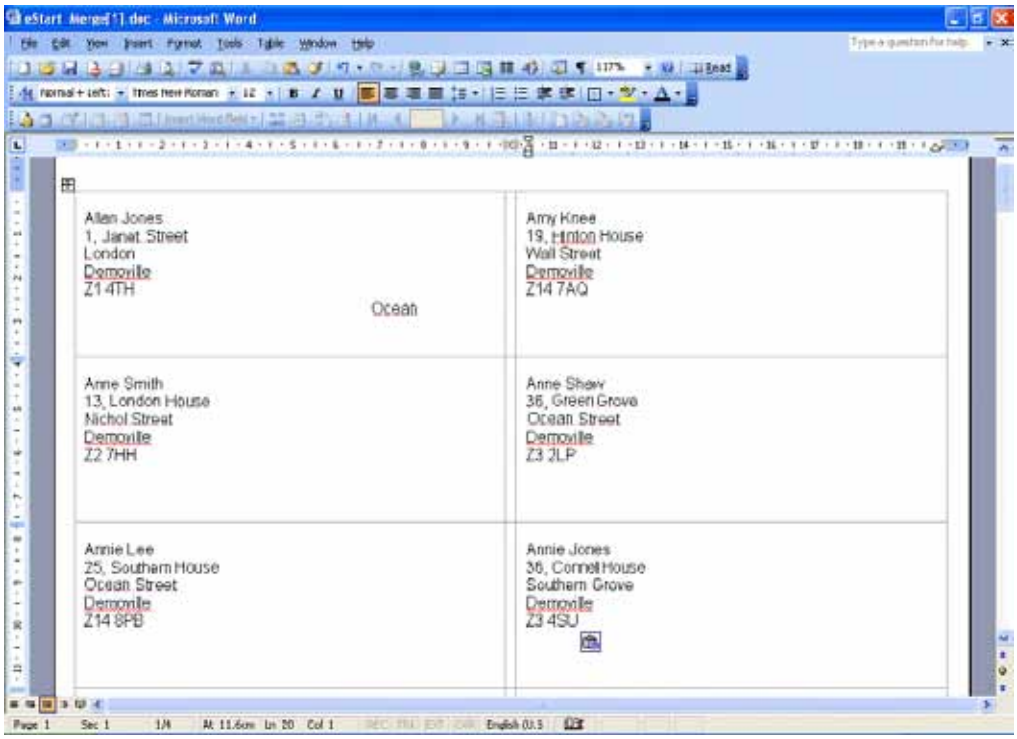


Figure 135 Mail Merge created by eStart

Email

Enter the subject and your message and click **Send**.

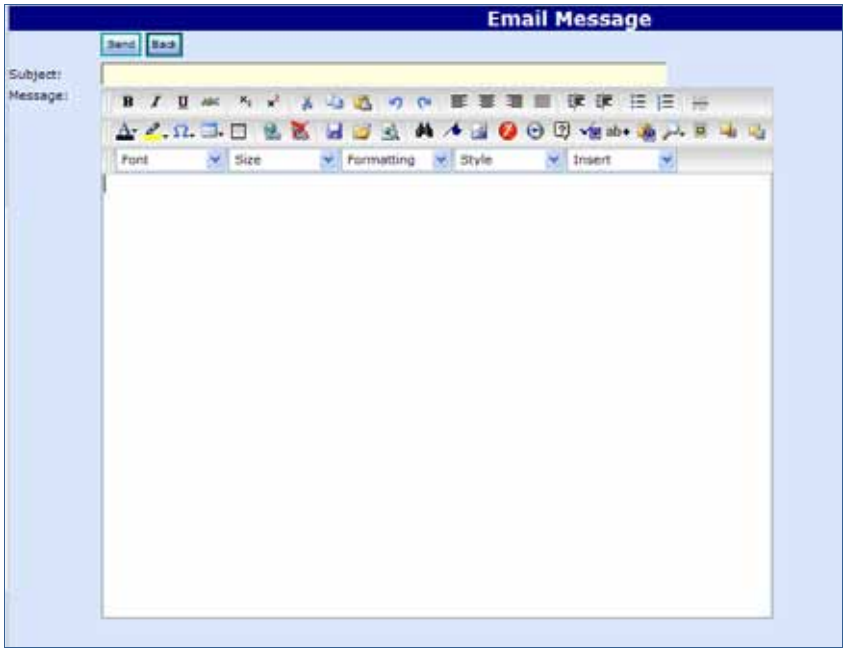


Figure 136 Creating an Email Mail Shot

You can insert media files / pictures as well as edit the font size and colour. These features as well as others can be found on the toolbars above the message box.

Text Message

Enter your message and click **Send**.

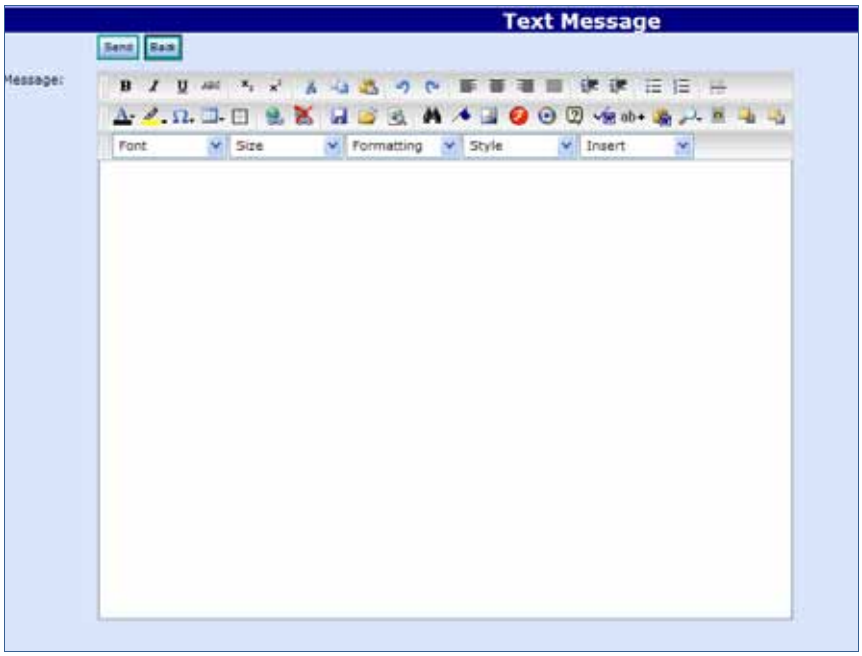


Figure 137 Creating a Text Message Mail Shot

You can edit your message before you send it, by using the toolbars. You will need to ensure that your chosen recipients have valid mobile phone numbers set-up against their details.

To Excel

This function allows you to export data from the lists you create to Microsoft Excel.

When you click the **To Excel** button you will be presented with a screen requesting you to select the fields you wish to export. You can choose to export as many headers (field names) as you like from the list.

Click on a single field name to select it for export. More than one field can be selected using ctrl + left mouse click or by clicking **All** to select all the fields.

Clicking on the **Toggle** button will select or deselect the fields.

Figure 138 Selecting Fields (Headers) to Export to Excel

Once you have made your selection, click on the **Export** button. You will then be asked if you wish to **Open** or **Save**. You can select either option depending on what you want to do.

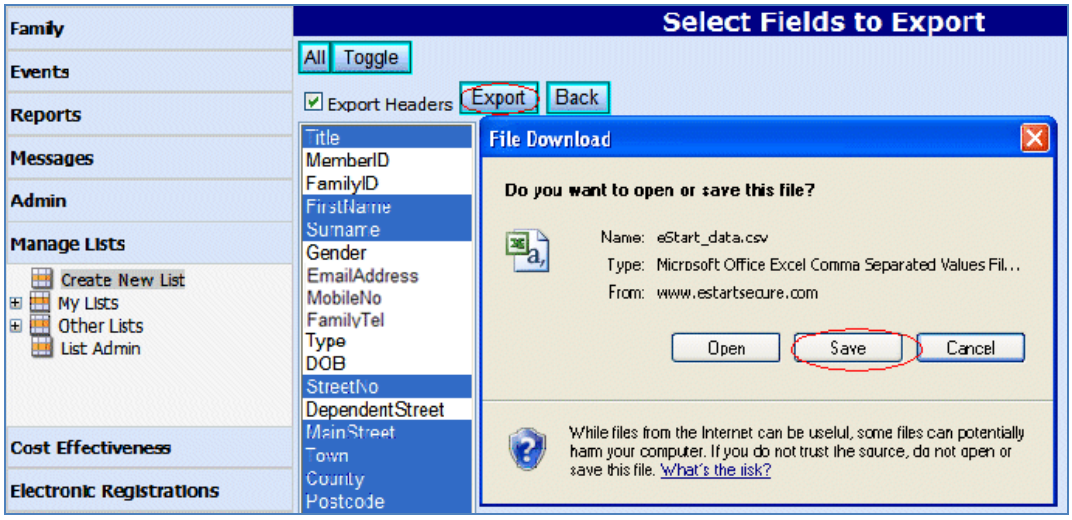


Figure 139 Confirming the export to Excel

Clicking on **Open** will export the data to Microsoft Excel.

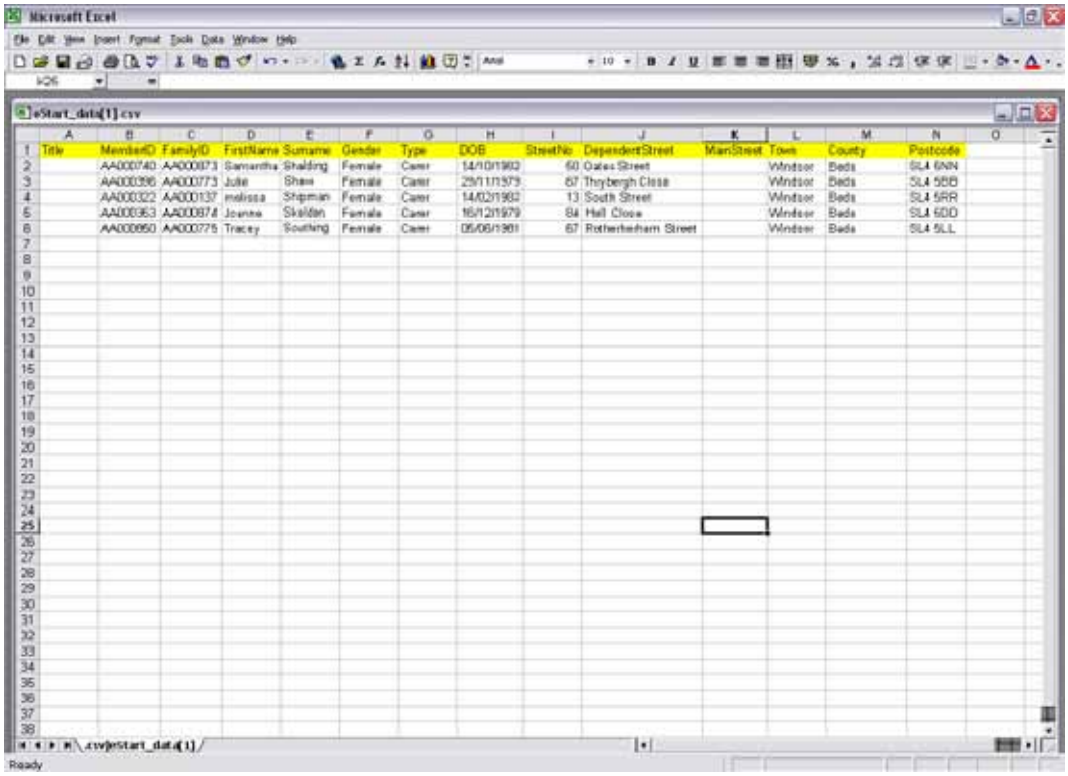


Figure 140 eStart data exported to Excel

To CTF

Using this option you can export the list to an XML file.

File Download
Do you want to open or save this file?
Name: eStartCTF.xml
Type: XML Document, 111 bytes
From: xppc4780
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Save the file to a suitable location.

My Lists

All the lists made by you are listed when you open the **My Lists** menu option. The lists marked with an asterisk (*) are Dynamic lists and those without are Static lists (the Dynamic lists appear below the Static lists). You can make any desired changes to your lists and save them, either as the same list or as a new list.

These can be either **Public** or **Private Lists**.

Other Lists

The lists which do not belong to you but are available for your use (i.e. were created by another user and saved as **Public Lists**) are listed when you open the **Other Lists** menu option. If the selected list does not belong to you then you cannot save the changes. The **Save** button will not be available for these lists.

List Admin

The **List Admin** section allows users to manage lists that they have created and saved. Click on **List Admin** in the left hand side menu.

You will see a dropdown at the top of the page; this lists all users that have saved lists on the eStart database. Selecting a user will display that person's saved lists.

These lists can now either be loaded or deleted depending on what you want to do.

Figure 141 Manage Lists screen

Messages

Sending Messages through eStart

There are two ways of sending messages (Emails and Text Messages) from eStart.

- If you wish to contact non-eStart users (for example parents) or a pre-defined list of eStart users then you need to use the Export function within Manage Lists - see page 62 onwards.
- If you wish to contact eStart users (e.g. Careworkers), the Messages function allows you to create and send emails and SMS/Text messages through the eStart database. Please note this is not used to contact the support desk.

The **Messages** functions are described below.

Sending an Email through eStart

Click on **Messages** in the left hand side menu, and then click on **Email**.

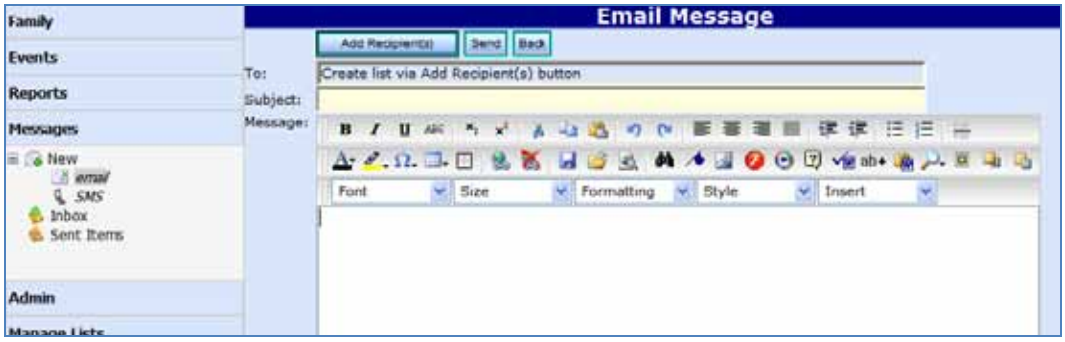


Figure 142 Sending emails through eStart

Type your message in the space provided. Enter a subject heading in the subject field and select **Add Recipient**. You can insert media files / pictures as well as edit the font size and colour. These features as well as others can be found on the toolbars above the message box.

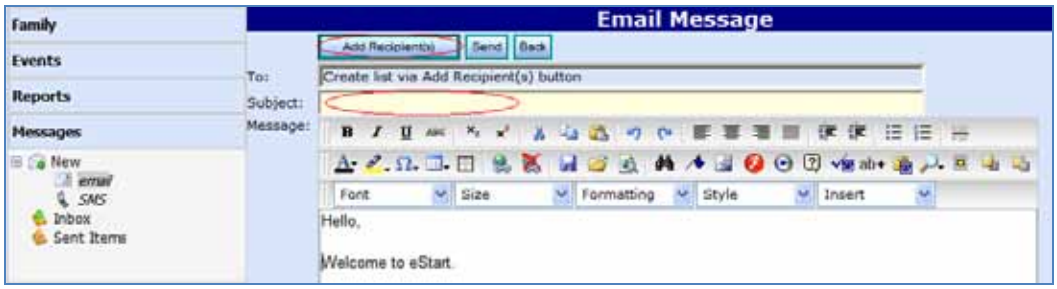


Figure 143 Email Tools

When you click the **Add Recipient** button, you will be presented with a list of names for all care workers. You can select as many recipients as you wish from this list.

To select a recipient click on **Add**. When you have finished click on **OK**.

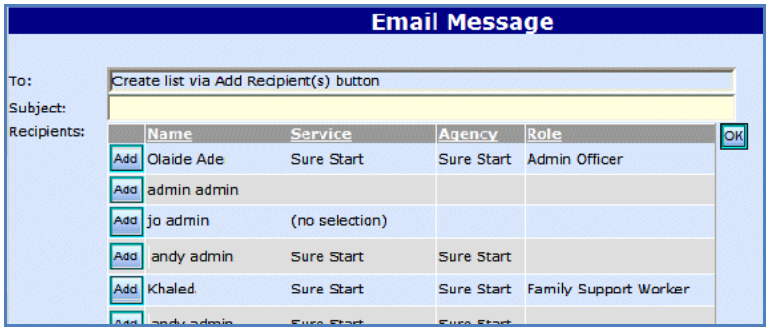


Figure 144 Selecting Email Recipients

Now click on **send**.

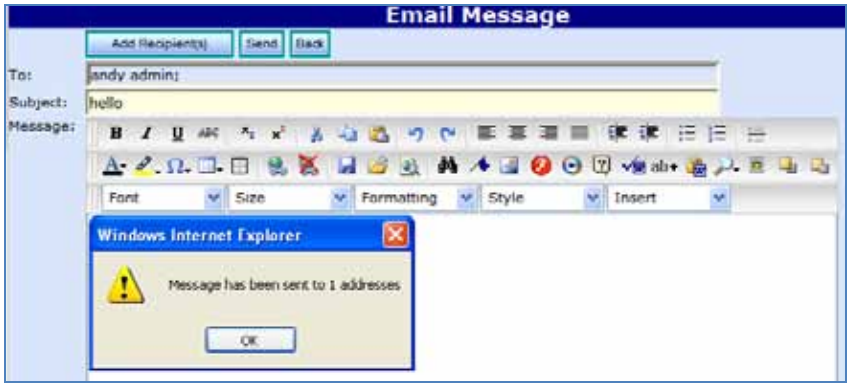


Figure 145 Email Confirmation

Your message has been sent and you will now receive a confirmation message.

Sending an SMS Message through eStart

Administrators should contact **One** Support to activate this function.

The eStart database has an SMS feature built in to it. It allows users to send text messages to mobile phone numbers. To send an SMS, type your message in the space provided. You can also edit your message before you send it, by using the toolbars. You will need to ensure that your chosen recipient has a valid mobile phone number set-up against their user details (these can be found in Admin / **Manage Users**).

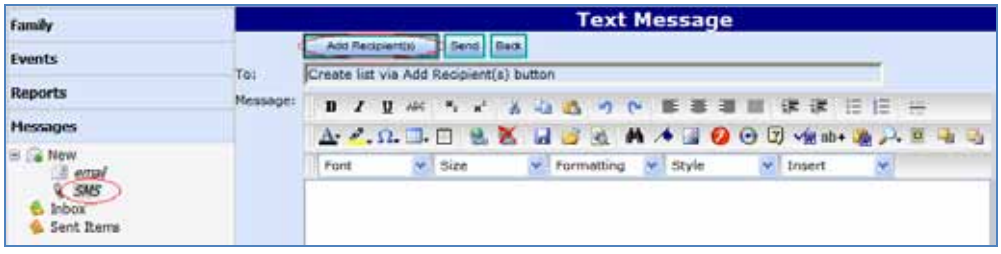


Figure 146 Sending SMS Messages through eStart

Once you have finished writing your message you will need to select a recipient by clicking on the **Add Recipient** button. You will be presented with a list of user names to select from. Make your selection and click on **OK** - please see screenshot below.

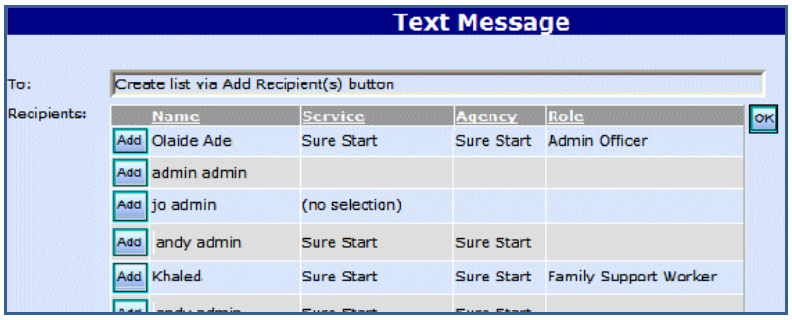


Figure 147 Selecting SMS recipients

Now click on **Send**.

You will receive a message confirmation after to say your message has been sent.

Figure 148 SMS Text Message example

Inbox

The **Inbox** is where any received messages will be stored. You can also read and delete any messages from the inbox by selecting the relevant tabs. Please see the screenshot below.

Once read, you can also reply to a message in your inbox.

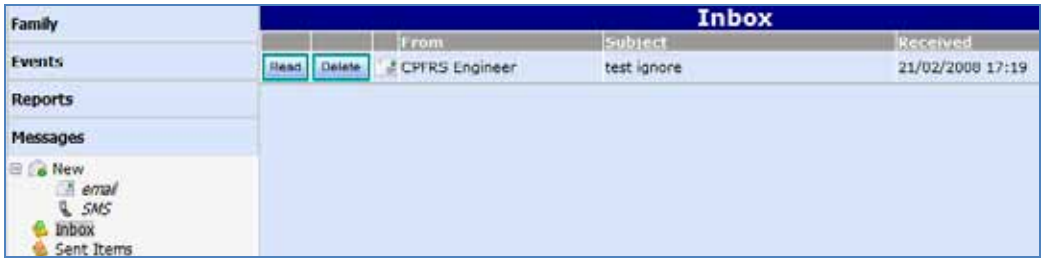


Figure 149 Message Inbox

Sent Items

Sent Items allows you to keep a record of any messages you have sent through eStart. To view a sent item you need to click on **Read**.

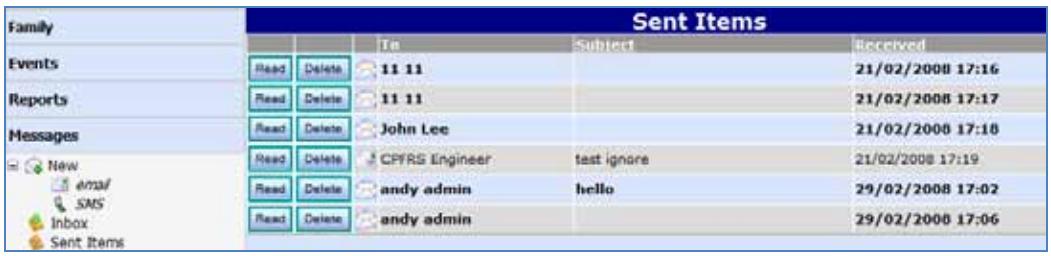


Figure 150 Messages | Sent Items

Once you have read your message, you can delete it, reply to it or alternatively go back to the inbox.

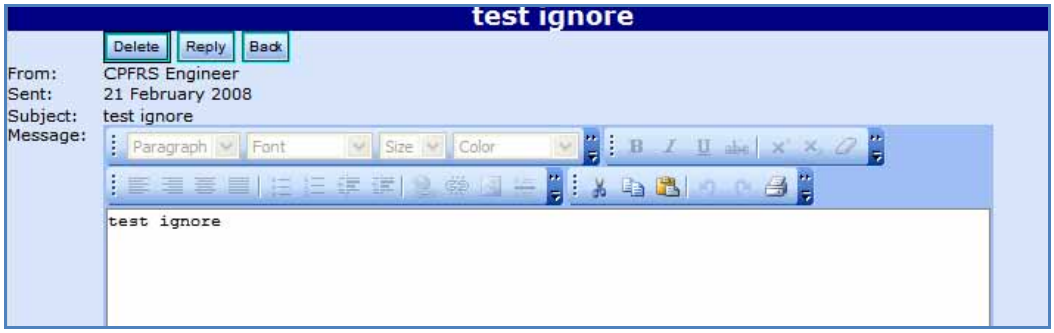


Figure 151 Message display

ContactPoint

ContactPoint Overview

ContactPoint is a key element of the Every Child Matters (ECM) programme which is designed to help services working with children, young people and their families to work together more effectively. It is an online Government directory of basic information about all children in England and any contacts they have had with services and agencies.

It allows authorised staff to use a search facility find out which other agencies or services are working with the same child or young person, so making it easier to deliver more coordinated support.

Only contact information is held, as specified in Section 12 of the Children Act 2004. The details of the actual support provided by the other agencies or services are **not** held on ContactPoint.

The following information is stored:

1. Name, address, date of birth, gender and a unique ID number[5].
2. Name and contact details of anyone with parental responsibility for the child.
3. Contact details for basic services working with the child, including educational setting (e.g. school) and SENCO (of these only the association with a Children's Centre is sent from eStart).
4. Contact details (name if known, address and telephone number) for other service providers that have had professional interactions with the child, for example a health visitor or social worker. These are added over time as they occur. This information includes whether a practitioner is a lead professional[6] and if they have carried out an assessment under the Common Assessment Framework (CAF).

In most cases the information will be held until a child's 18th birthday, however some care leavers or those with learning difficulties can, under certain circumstances, remain on ContactPoint until they reach 25[7] (or a date between their 18th and 25th birthdays that has been defined as their **Adult Transition Date**).

Only children living in England are included.

ContactPoint and eStart

eStart has the facility to send information to ContactPoint about involvements (professional interactions) resulting from the actions of Local Authority staff and for end users to query the information held (see **Search ContactPoint** on page **78**).

The information is sent electronically from eStart to ContactPoint in an XML file, in the form of **Fragments**. A fragment is made up of the child record (i.e. the identifying information as in point 1, above) and all contact details (from points 2, 3 and 4, above) deemed worth sending. Whenever a file is sent to ContactPoint all fragments (child records) are sent each time, not just those that are new or have changed.

[5] *i.e. the minimum amount of information needed to identify them as an individual*
[6] *This is not sent from eStart as Lead Professional is not currently stored in the system.*
[7] *This requires informed, explicit consent.*

As a normal eStart user you should not have the permissions or the responsibility to actually tell the system to send information to ContactPoint, however you may make alterations to children's records or their contacts that will trigger the system to send changes to their ContactPoint record.

Whose Records are sent to ContactPoint?

In the case of eStart, fragments will be sent for all individuals (both children and carers) that are registered with a Children's Centre.

A child in ContactPoint is defined as anyone under 18, so a carer in eStart can be a carer or a child in ContactPoint. If a date of birth has not been entered then the person's age is unknown, so no fragment will be sent.

All people between the ages of 0 and 24 on the day of the transmission that live in England can be considered for sending to ContactPoint.

Stop Notice

If there is a **Stop Notice** stored against a person (indicated on the Child Details), no information will be sent to ContactPoint for them. Stop notices will usually be recorded against everyone who is 18 or over, so most adults will not be sent to ContactPoint unless they are also a carer with parental responsibility (in this case only their name and contact details will be sent on another fragment). They can be overridden as follows:

For a standard refresh (ContactPoint update), for those between 18 and 24 inclusive, stop notices are not overridden.

For a standard refresh, stop notices are overridden if the child is under 18 and:

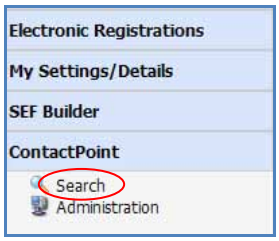
- There is a new involvement or
- A new address is entered for the child which is in England where the child previously lived outside England (indicated by **Left England** being set to true) or
- There is a change to the child's Date of Birth or Date of Death or
- There is a change to the pre-archive period

Note: a stop notice that is overridden will be removed from the child, however it is likely that the stop notice will come back from ContactPoint when the new data is included in the next file. If so, the new stop notice will be stored against the child as usual.

For full refresh (data update), stop notices are overridden if the child is under 18 and:

- The child's current address indicates that the child lives in England or
- There is a current involvement for the child or
- The child has died within the last 12 months

Search ContactPoint



To search ContactPoint, click **ContactPoint**, then **Search**. If you have accessed ContactPoint before and have a current valid user assertion you will then be taken straight to the ContactPoint Search screen.

In order to access the eStart ContactPoint Search screen you must have a valid User Assertion (i.e. ContactPoint must identify you as a person with suitable access permissions to carry out a search). If you do not have a valid User Assertion (if you are in a new session or your assertion has expired) then when you click **Search** you will instead be taken first to a ContactPoint Authentication logon screen.

ContactPoint Authentication

If you are a user who is to have access to search ContactPoint and do not have a current User Assertion, you will need to authenticate your ContactPoint credentials. First, you will need to be set up with your authority's ContactPoint Identity Provider (IdP) and supplied with a ContactPoint User ID and Password[8].

Your ContactPoint User ID and password are completely independent of your eStart User ID and password.

In order to log in and be recognised as a user you will need to provide two items of information in addition to your user name. These will usually be the password and an access code randomly generated by a token device (this may vary). When you have carried out the Authentication process you will be issued with a current[9] User Assertion and the search screen will open automatically.

ContactPoint User Authentication - Example of Process

A typical ContactPoint authentication process is described below. This is an example only to give a guide to what you might encounter. The actual appearance and content of the screens will depend on which IdP your Local Authority has chosen to use.

1. First, you need to enter your ContactPoint User ID and password.
2. Once you have done this and clicked **Next**, you will be taken to a second screen where you will need to enter an authentication code and log on. You will be able to get the authentication code by using an ActivCard® Token or similar device and it will be generated uniquely each time.
3. The first time you use these logon details you will need to change your password. For security the new password you choose must not be easily guessed and must be a mix of letters and numbers.
4. When you have saved your new password you need to select security questions and enter the answers to these questions. These questions might be asked by the IdP when you log in again, as an additional security check.
5. When you click on **Save** you will then be taken to the eStart ContactPoint Search screen where you can enter search criteria.

[8] *The issuing of these will depend upon the arrangements in your authority. It might be the responsibility of the eStart Administrator, but it may be that your authority has a separate ContactPoint Administrator who will carry this out.*
[9] *A User Assertion will normally last for 30 mins - 2 hrs. This is determined by the IdP.*

ContactPoint Search Screen

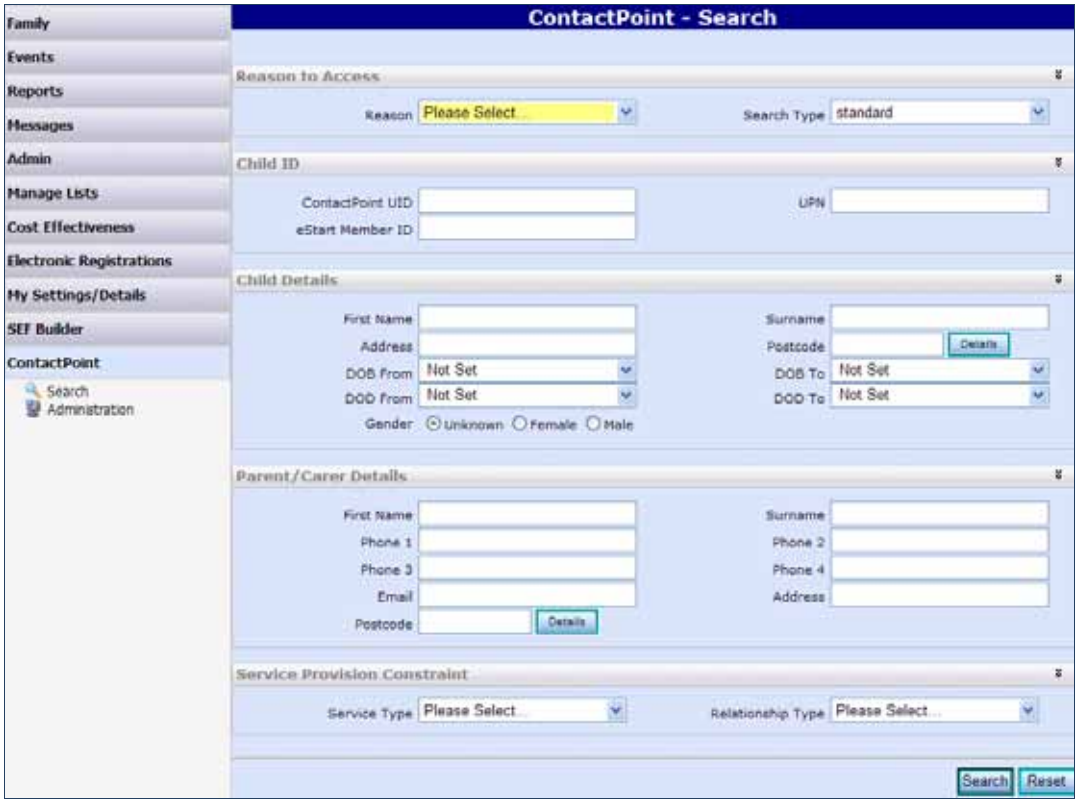


Figure 152 ContactPoint Search Screen

If you have accessed ContactPoint before and have a current valid user assertion (authentication) then when you click on **Search** in the ContactPoint menu you will be taken directly to this screen. Otherwise, you will need to first log on to ContactPoint to obtain a valid user assertion.

An important point for users and administrators to note is that the search itself is not implemented by **One**/eStart; ContactPoint carries out the search and has total control of any results that are presented.

You must select a **Reason for Access** to ContactPoint and a **Search Type**.

- **Best-view**: ContactPoint determines what is most likely to be the best data and searches within those items only.
- **Missing-children**: searches children marked as Unknown Address.
- **Standard**: searches all children. This is the default.

The different sections of the screen can be expanded or collapsed to show or hide additional search fields.

If you search for a child using information that does not include address details then shielded records will be listed in the search results. However, if you search using a postcode or address then shielded results will **not** be listed as this will confirm the shielded child's address, which is not permitted.

Click **Search** to display a list of matching results:

Figure 153 ContactPoint Search Results

To view the complete record, select a Reason from the drop-down list, choose which view you would like (Best, Complete or Last Update), click on the radio button in the **Retrieve** column for the record you are interested in and click the **Retrieve** button. You cannot retrieve the details of a shielded record. The **ContactPoint - Child Details** for the selected child will be displayed.

ContactPoint - Child Details

This screen will be displayed when you have retrieved a child's ContactPoint record. It shows all the information held within ContactPoint for that child.

The amount of information displayed will vary depending on which view you chose on the previous (Search Result) page.

- **Best View** gives the data most likely to be of interest, with one line for each update.
- **Complete View** gives all the data available, including details about how the updated information was verified.
- **Last Update** only gives you information from the last fragment that was sent to ContactPoint.

If you initially chose the view type of **Last Update**, a button at the bottom of the page allows you to display the **Best View**. Once you have the Best View you can use the button to display the **Complete View**. You can then toggle between Best and Complete View. Whenever you change the View Type you must also select a **Reason**.

If there are any warnings attached to the record (e.g. if there is a Sensitive Service involvement - see **Service Provisions Tab**, below), they will be indicated in the top left hand corner of the page.

There are four tabs to the Child Details page - Child Details, Parent Carers, Service Provisions and Disputes.

Child Details Tab

The Child Details **Complete View** consists of DSIs (Domain Specific Identifiers), names, addresses, gender and date of birth (including how and when these were verified) and other details such as the child's Adult Transition Date (normally their 18th birthday), the Accountable Body and whether they have left England and have no intention of returning.

The **Best View** displays the same basic information but without the verification details, and with only one entry for gender and date of birth (as these would not normally be expected to change from one update to the next).

Parent/Carers Tab

This tab displays the names, address and email of all parents and carers for the child. If you click on the Details button for a parent/carer you will be able to see the complete details for this person, which also include the verification information, the dates they have lived at the address, the date of the last update, contact phone numbers etc.

Service Provisions Tab

This tab gives contact details for all services and agencies that have had professional interactions with the child.

There is a line of information for each service with a **View Details** button to open another page with more detailed contact information for the service. If you have permissions to view sensitive services then these will be highlighted in a different colour to the other services.

Sensitive Services

Sensitive Services are those related to drug abuse, mental health or sexual abuse.

If there are any sensitive service involvements recorded for a child, this will be indicated as a warning in the top left corner of the page.

Most users are not allowed to see sensitive services - you need a special access right that is granted by ContactPoint, and provided by the IdP.

- If you don't have the access right you will get the warning that there are sensitive services, but you will not see any information about them at all.
- If you do have the access right you will see the provision displayed as a highlighted row and you will be able to view further contact details.

Disputes

If a Parent/Carer or child contests the accuracy of a piece of information held in ContactPoint, it is the responsibility of the ContactPoint Administrator to enter this as a dispute. This is done through a separate ContactPoint interface to which they will have been given access.

The fourth and final Child Details tab will list any such disputes.

Add on Modules

Electronic Registration

Electronic Registration allows your new Centre members to fill in a form using a special pen called a **Digipen**. This automatically transfers the form to eStart where you can see the form. The best thing about the Digipen is you no longer have to manually enter details; you do, however, need to review the data that the pen has read and make sure it has been correctly transferred.

Getting Started

Your eStart Administrator or IT Dept will have set up your Digipen for you. It should have been in its cradle for some time to allow it to charge up in the same way your mobile phone charges.

- Start filling out the form with the Digipen, ensuring that Block Capitals are used (although the system can also read lower case letters)
- Make sure the letters are all inside the boxes
- When the form is complete, touch the area on the form marked **Send Form to PC**

Search for a Form

Log into eStart and click **Electronic Registrations** then click **Search Registration Forms**. The **Search Registration Forms** screen will be displayed:

Figure 154 Search Electronic Registration Forms.

Enter your search criteria, choosing at least a Form Status, Program Code and Upload Date.

Click **Search** to display a list of matches.

On the Search Results screen you can **Edit** or **Delete** the forms that were transferred from the Digipen to eStart.

Figure 155 Search registration forms.

- Click **Edit Form** to review your form.
- Click **Delete Form** to remove the form from the database.

Edit and Submit Your Form

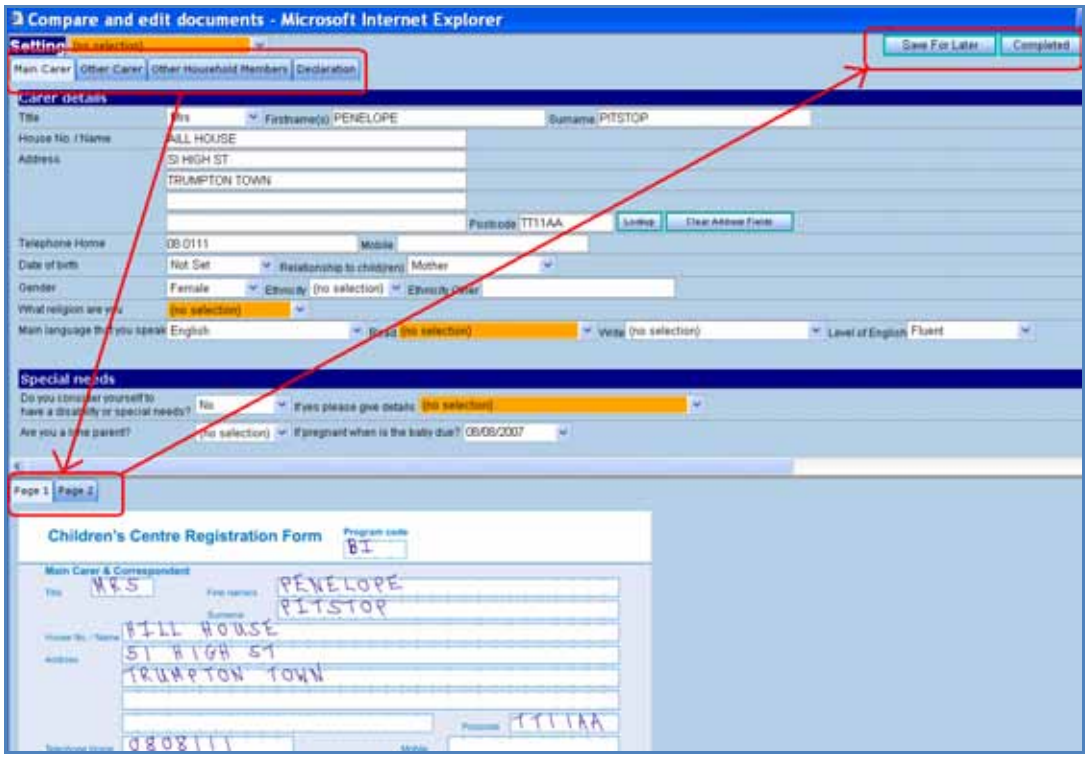


Figure 156 Electronic Registration Form

At the top of from you will see New Carer, Main Carer, Other Carer, Other Household Members and Declaration.

Review each section in turn, checking the data against pages one and two on the electronic form on the lower section of the page. Make any changes and corrections that need to be made.

When done, click **Save for Later** or **Completed** to transfer the family to eStart.

You will see the following message:

Your family has been successfully transferred to eStart.

Cost Effectiveness

The **ECM**[10] **Outcomes Framework** requires Local Authorities to monitor and evaluate their childcare settings and demonstrate they are delivering services to improve outcomes for Children and Young People. The **Cost Effectiveness Module** provides Authorities and settings such as Children's Centres with all the tools necessary to conduct local evaluations and report on their effectiveness and costs against local and national targets.

How to Access Cost Effectiveness

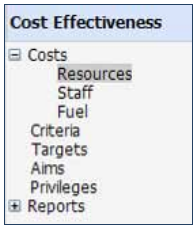
Administrators should ensure that Cost Effectiveness is set to **Full Access** for the relevant group under **Admin**, **User Groups**, **Manage User Groups**, and **Misc**.

Log into eStart and click on **Cost Effectiveness** on the left hand side of the screen. The following menu appears:

Figure 157 Cost Effectiveness menu

Here you can set your Costs, Criteria, Targets and Aims for Events.

Costs



To configure your costs, click on the + next to Costs and click on **Resources**.

Figure 158 Edit Costs (note: this screenshot contains some scrambled data)

[10] *ECM - Every Child Matters*

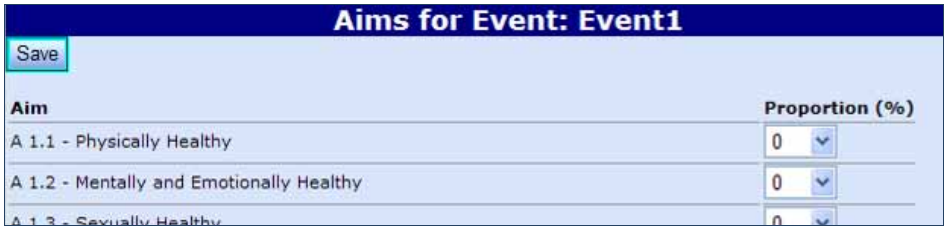
Click **Edit Costs** on the right, and then **Add** on the next screen (where any costs already entered will be listed) to add in your costs. You will see a screen similar to this where you can enter details of the cost:

Figure 159 Setting Resource cost

In the same way, click on the left pane, then click on **Staff** or **Fuel** to add in costs for these.

Criteria, Targets and Aims (% of an Event)

From the Resources screen you can add in the % of each Criterion, Target and Aim for an Event. Each of these buttons opens a list of all Criteria, Targets or Aims (these can be edited through the Criteria, Targets and Aims menu items in the left hand pane). You can enter the % for as many of each as you wish, but each type cannot add up to over 100%.



Criteria, Targets and Aims (Editing)

Click **Criteria** , **Target** or **Aims** in the left pane. The right hand screen will then list all the Criteria, Target or Aims items as appropriate. Click **Edit** on the right to edit the name of the item or reset the item to Local or National or both.

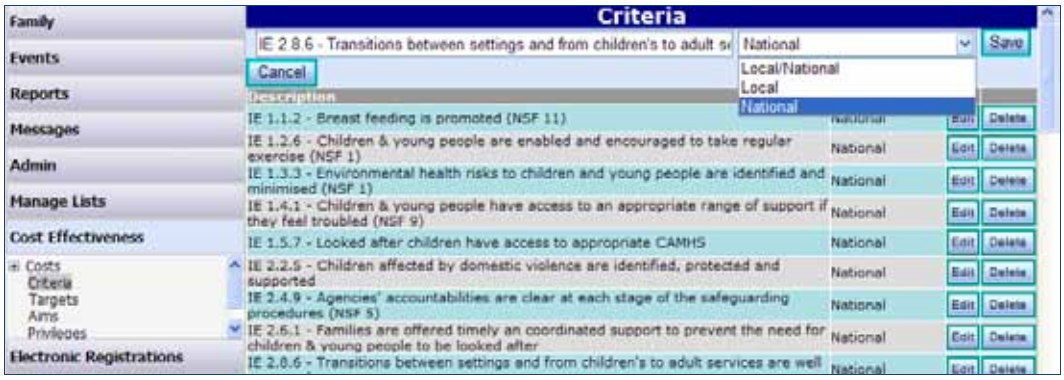

Family
Events
Reports
Messages
Admin
Manage Lists
Cost Effectiveness
Costs
Criteria
Targets
Aims
Privileges
Electronic Registrations
Criteria
IE 2.8.6 - Transitions between settings and from children's to adult s
National
Save
Cancel
Local/National
Local
National
Description
IE 1.1.2 - Breast feeding is promoted (NSF 11)
IE 1.2.6 - Children & young people are enabled and encouraged to take regular exercise (NSF 1)
National
IE 1.3.3 - Environmental health risks to children and young people are identified and minimised (NSF 1)
National
IE 1.4.1 - Children & young people have access to an appropriate range of support if they feel troubled (NSF 9)
National
IE 1.5.7 - Looked after children have access to appropriate CAMHS
National
IE 2.2.5 - Children affected by domestic violence are identified, protected and supported
National
IE 2.4.9 - Agencies' accountabilities are clear at each stage of the safeguarding procedures (NSF 5)
National
IE 2.6.1 - Families are offered timely an coordinated support to prevent the need for children & young people to be looked after
National
IE 2.8.6 - Transitions between settings and from children's to adult services are well
National
Edit
Delete

Figure 160 Criteria Definition

Reports

Choose **Staff** or **Criteria**, select your reporting options and click **Run**.

The report is displayed. Use the Crystal bar to export, print, change page or search the results. See **Report Toolbar** on page 114.

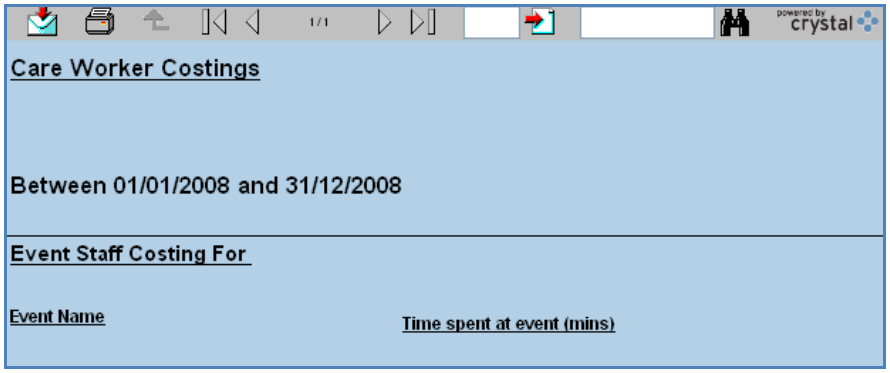


Figure 161 Cost Report

UNA – Universal Needs Assessment

A **Universal Needs Assessment** (UNA) enables health visitors to work with shared, centralised caseload information that maps and tracks child and carer needs through an evidence-based tool that supports professional assessment.

- A UNA Identifies intervention requirements and enables 'informed' commissioning of services
- It is a social capital tool to identify vulnerability and resilience and enable and support the identification of hard-to-reach children and carers
- It empowers community practitioners to be accountable and inform professional practice
- It performs trend analysis of historic data to assist impact assessments on children and carers
- There are potential cost reductions to the local authorities and the NHS by informed targeting of preventative services

For detailed descriptions of the UNA Reports please see **Appendix A: UNA Report Descriptions** on page 116.

Create New UNA

When creating a new UNA there are several factors to take into account: The type of UNA you wish to create (Family, Child or Carer); the Template you wish to use for your UNA and if you want to use the last UNA created for the person/family. The menu system can be seen below, and shows the changes made to the Family menu.

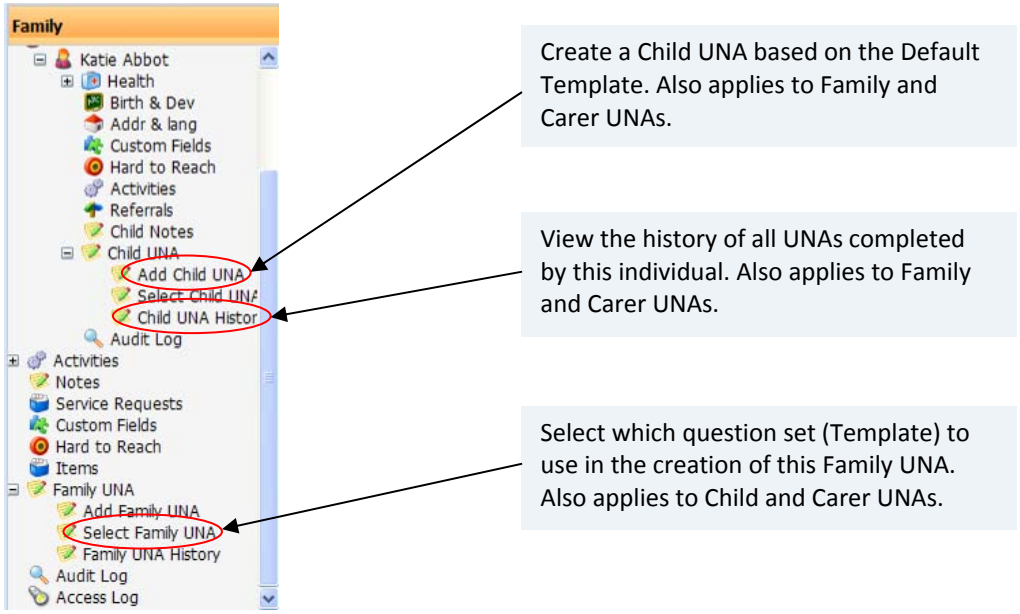


Figure 162 UNA Menu

Create Default UNA

To create a default UNA simply select the member/family you wish to create the UNA for and click "Add [X] UNA" (where [X] is the member type of the selected member/family). This will open the page for answering UNAs based on the default template as in Figure 163.

Figure 163 UNA Screen

When editing a UNA there are three **Save** options. These are:

- **Save**, which overwrites the current data in the database
- **Save to New**, which retains the old UNA as it was before editing, creates new records for the UNA data and allows the new UNA records to still be edited
- **Save and Lock**, which overwrites the current data in the database and prevents any further editing of the record.

Select UNA to Create

If the default UNA is either not suitable or not wanted, click “Select *(Carer/Children/Family)* UNA” in the left hand menu. The page that loads will resemble Figure. The table contains a list of all templates that exist for the selected member type. Details for each template are shown, and include information about the template (name, description, the template's creator, when it was created, if and when any user has modified template). To create a UNA based on any of the templates shown simply click the “New” button in the relevant row.

Figure 164 Select (Carer) UNA

The UNA will open as shown in Figure 163. You can then make all the necessary entries and choose a suitable **Save** option (as described above).

View UNA History

Viewing a UNA's history allows the user to see all UNAs completed by the selected member, as well as allowing the editing of UNAs. To view the history of a certain individual/family simply click *(Carer/Children/Family)* UNA History in the left hand menu. This will then load a page similar to that shown below, listing all the UNAs of that type in the order they were last modified.

If the person who last edited a UNA chose **Save** or **Save to New**, an **Edit** button will be displayed for the UNA. Clicking this opens the UNA screen (Figure 163). If they chose **Save and Lock** you will not be able to edit the UNA but if you click on the **View** button you can still see all the details.

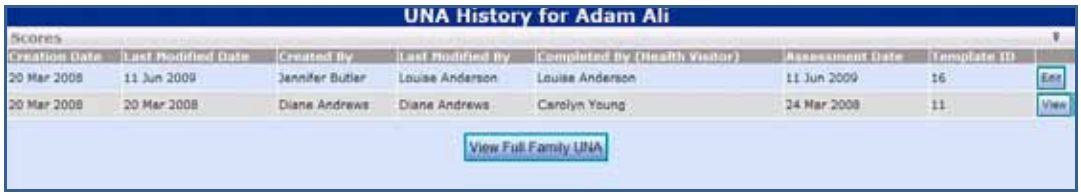
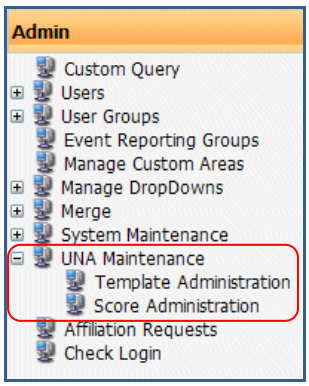


Figure 165 UNA History

If you click on **View Full Family UNA**, this will take you to a screen that allows you to run the UNA Report as described on page 153.

UNA Maintenance

In the UNA Maintenance section there are two options, Template Administration and Score Administration. These both link to different views of the same page, allowing multiple uses of the same data. For the creation of new templates and the modification of existing ones click **Template Administration** or if you wish to change the score weightings on a specific template click on **Scores Administration**.



Within the Admin menu open the System Maintenance section, followed by the UNA Maintenance section

Figure 166 UNA Administration Menu

UNA Template Administration

To perform any actions which require creating, modifying or deleting a template or any part of a template the Template Administration menu must be accessed; this can be found in the main menu via Admin | System Maintenance | UNA Maintenance | Template Administration.

Figure 167 UNA Administration

Please note none of these features are limited to a new section; all the tasks mentioned below may be completed in any type of Template Maintenance unless otherwise stated.

Create New Template

If you wish to create a new template you either create an entirely new template from scratch or you can modify an existing template.

Start From Scratch

To create a brand new template first you will need to enter the Template Maintenance section. Underneath the table listing the templates is a button labelled **New Template** (see Figure 167). Clicking this button will open an empty template ready for editing:

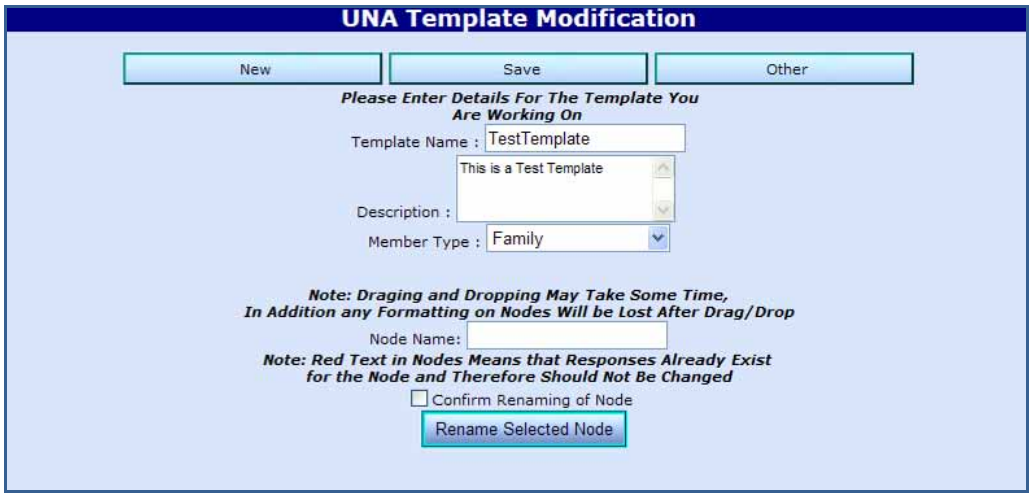

UNA Template Modification
New
Save
Other
Please Enter Details For The Template You Are Working On
Template Name : TestTemplate
Description : This is a Test Template
Member Type : Family
Note: Draging and Dropping May Take Some Time, In Addition any Formatting on Nodes Will be Lost After Drag/Drop
Node Name:
Note: Red Text in Nodes Means that Responses Already Exist for the Node and Therefore Should Not Be Changed
Confirm Renaming of Node
Rename Selected Node

Figure 168 Creating a new UNA Template

Details of the tasks that will populate this template are described below.

You cannot assign score values until you have saved the template.

New Section

Creating a new section in the template is a relatively simple process. Click on **New** then click on **New Section**. This adds a node to the top level of the template, allowing other nodes to be added as children of this node to create questions for the section. See Figure 169.

UNA Template Modification
New
Save
Other
Please Enter Details For The Template You Are Working On
Template Name : Carer Template 2
Description : This is a second Carer Template
Member Type : Carer
ALERT! : Please Save Before Assigning Score Values
Note: Draging and Dropping May Take Some Time, In Addition any Formatting on Nodes Will be Lost After Drag/Drop
New Section
Node Name:
Note: Red Text in Nodes Means that Responses Already Exist for the Node and Therefore Should Not Be Changed
Confirm Renaming of Node
Rename Selected Node

Figure 169 New Section

New Node

Click on the Section or Node you want to add the new Node to, click on the **New** button then click on **New Node**. You must make sure that a section or node from the web tree is selected first. This is because a node, in the context of the UNA system, must have a 'Parent' node.

UNA Template Modification
New
Save
Other
Please Enter Details For The Template You Are Working On
Template Name :
Carer Template 2
This is a second Carer Template
Description :
Member Type :
Carer
ALERT! : Please Save Before Assigning Score Values
Note: Draging and Dropping May Take Some Time, In Addition any Formatting on Nodes Will be Lost After Drag/Drop
New Section
New Node
Node Name:
Note: Red Text in Nodes Means that Responses Already Exist for the Node and Therefore Should Not Be Changed
Confirm Renaming of Node
Rename Selected Node

Figure 170 New Node

Rename Node

Renaming a node is essential when creating a new template since all new sections and new nodes are given arbitrary names. To do this, simply click on the node you wish to rename, enter the new name in the appropriately labelled box, check the confirm box and click **Rename Selected Node**. This will reload the page with the new changes in effect.

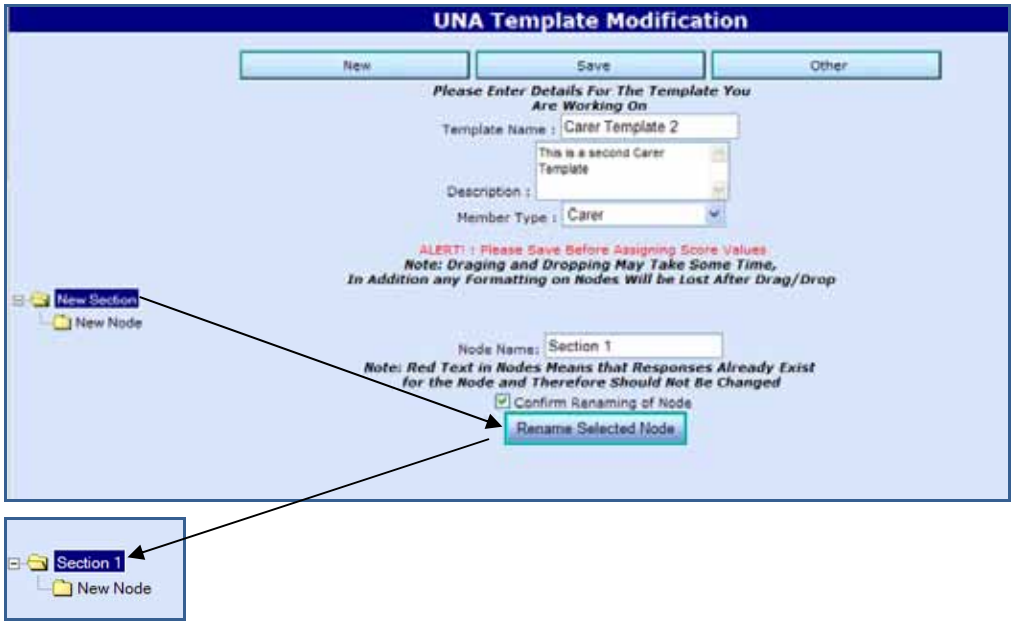

UNA Template Modification
New
Save
Other
Please Enter Details For The Template You Are Working On
Template Name :
Carer Template 2
This is a second Carer Template
Description :
Member Type :
Carer
ALERT! : Please Save Before Assigning Score Values
Note: Draging and Dropping May Take Some Time, In Addition any Formatting on Nodes Will be Lost After Drag/Drop
New Section
New Node
Node Name:
Section 1
Note: Red Text in Nodes Means that Responses Already Exist for the Node and Therefore Should Not Be Changed
Confirm Renaming of Node
Rename Selected Node
Section 1
New Node

Figure 171 Rename Node

Make Exclusive

Make Exclusive means to make a section mutually exclusive so that only one of the child nodes can be selected as an answer. This will not work with nodes whose children have children. This allows questions where only one answer is appropriate to have the actual answers limited to one item instead of relying on whoever is filling it in to only tick one box.

To make a node mutually exclusive, select the node and then click the **Other** button, then click **Make Exclusive**. This should change the text of the node to be bold and italic. If this is not the case then the node is most likely not mutually exclusive - check on the page for any error text (in red) which may have appeared.

Figure 172 UNA Template - Options available via "Other" menu

Modify Existing Template

Also available to you is the ability to modify an existing template, giving you the ability to correct mistakes made in earlier versions of the template or to add/remove questions from the template. The tasks listed in the previous section on creating a new template can also be applied when modifying a template in exactly the same way.

To modify an existing template first enter the Template Administration section. This time instead of clicking on new template click on the **Edit** link in the table on the relevant row. This will load a page containing a tree view for the UNA template; be patient however as it may take some time to load.

Figure 173 UNA Template - Modifying an Existing Template

Drag and Drop Nodes

If you wish to move a child node to another location, simply expand the tree view and drag and drop the node into its new location. Note that this might take some time and any formatting on the nodes will be lost. A node cannot be dropped onto the top level, instead you need to turn it into a section - see below.

Turn Node into Section

If you feel that a node would be better located as a top level node then, since it is not possible to drop a node on the top level, it is necessary to turn it into a section. This function takes a copy of the current node, adds it to the top level of the tree then adds the children of the original node to it and removes the original node. This however removes all restrictions from any items moved. I.e. items designated as mutually exclusive will no longer be so. To use this function, select the target node, click the **Other** button, select **Turn Into Section** and wait for the page to reload. This should have moved the node from its original location to the top level of the web tree. See Figure 172.

Delete Node

To delete a node, select the node, click the **Other** button then click **Delete**. However this becomes less straightforward when questions have been answered. For example, if you were to delete a node called "Do You Smoke?" with the responses 'Yes' and 'No' then the database would be linking 'Yes' and 'No' to a node which no longer exists. For this reason the delete button not only deletes the selected node, but also all the child nodes. However, if anyone had answered the questions those individuals would have an answer for a question which does not exist. Therefore no node with responses (or a parent anywhere along the line of a node with responses) can be deleted. This means that if the question and answers were the same, but the node 'Yes' had additional nodes beneath it and even just one of them had an answer, the node 'Do You Smoke?' could not be deleted. See Figure 172.

Overwrite Existing Template

This is one of two methods of saving the template you have been modifying. This method replaces the template you started editing with the new, modified template. Click on the **Save** button, then click **Overwrite**. This will remove any occurrence of the old template from the database and replace it with the new version. If any of the nodes or settings for nodes are different from the old template then new versions are created and inserted into the database.

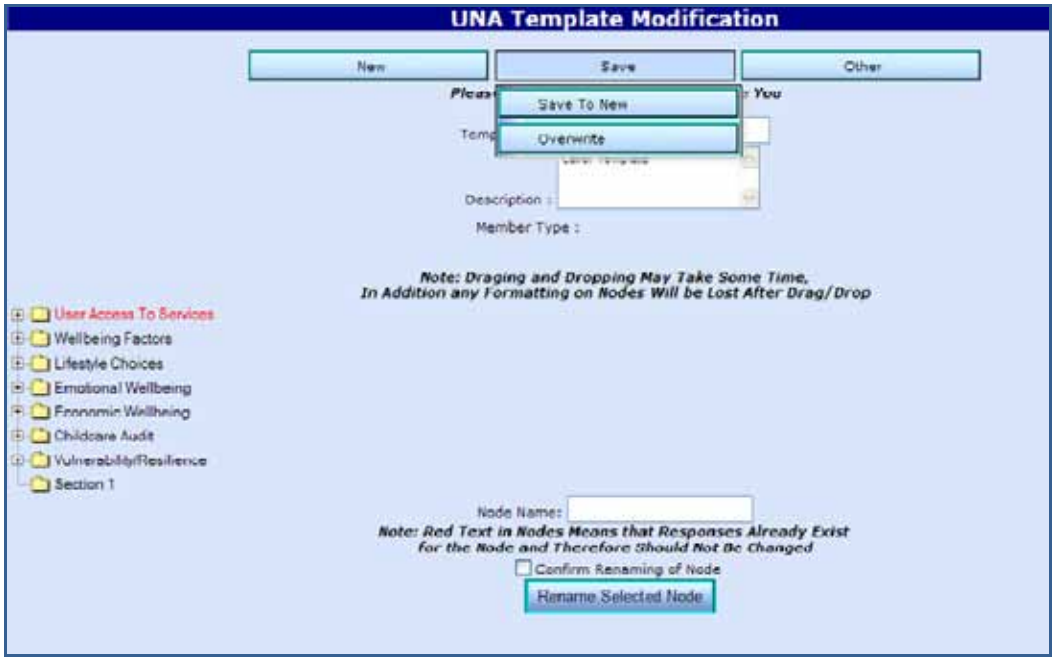


Figure 174 Modify UNA Template - Overwrite Existing Template

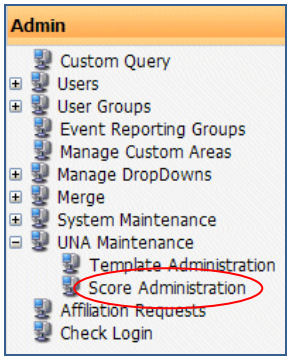
Save to New Template

This is an alternative save method. It saves all the nodes and sections in the database to a new template regardless of whether or not you decided originally to modify a template or create a new one from scratch. To save the template you have been working on to a new template, click the **Save** button then click **Save To New**. See Figure 174.

UNA Score Administration

Another feature of the UNA system is the ability to grade members on certain criteria. This allows care workers to gauge risks to members and any dependants under their care. E.g. if a person smokes then this will be listed in their UNA and a tally kept of all questions which are linked to smoking. If a particular answer implies a serious risk then the value of the particular node may be increased.

Assign Score Values



To assign score types to a template you must be on the Score Administration page. This page can be reached by going into the Admin section of the main menu, then UNA Administration then finally Scores Administration.

Figure 175 UNA Maintenance Menu

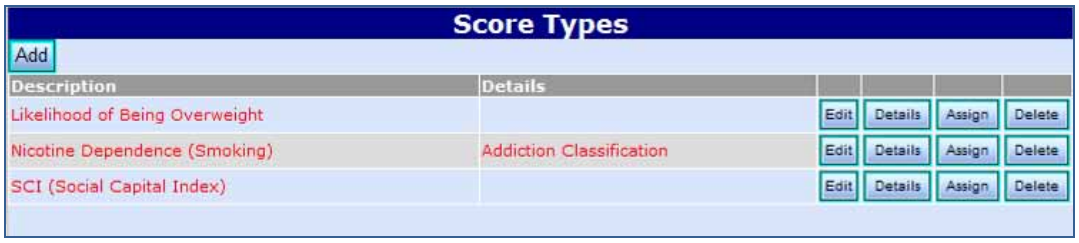


Figure 176 UNA Score Administration page

After the page has loaded then you need to select a template to assign the scores to. In this way scores can be unique for each template if necessary. Click the **Assign** button for the template you wish to work with. None of the actions you now carry out will affect any other template than the one you are currently processing. This route does not allow you to add new Score Types to the template.

Figure 177 Assign UNA Scores

An alternate way to load the Scores Administration page is to access the Template Administration page and click **Other**, then **Assign Score Values**.

Figure 178 Assign UNA Scores - alternate route

This will open the following page. By following this alternate route you can also add new Score Types to the template.

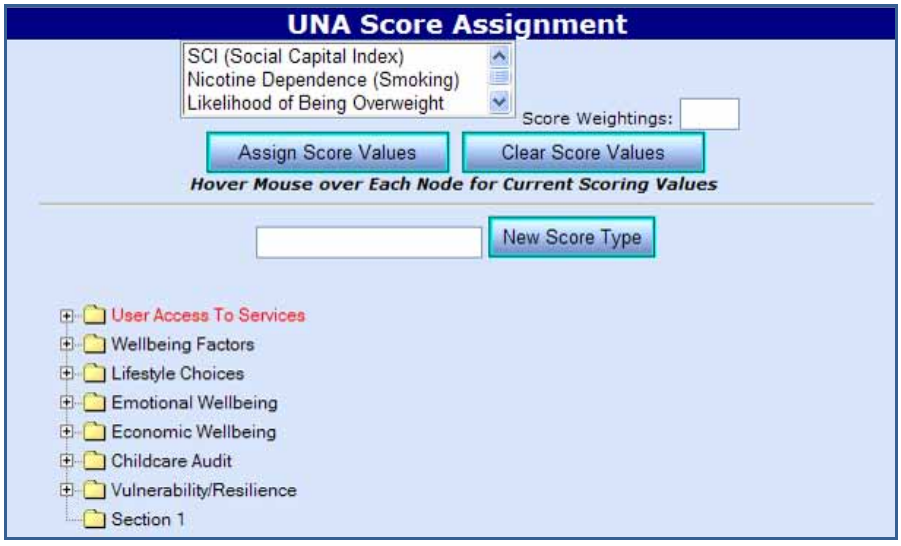


Figure 179 UNA Score Assignment

Create New Score Type

To create a new score type for the template you need to type the name of the new score type into the appropriate box and then click “Create New Score Type”. This will add an item into the list box at the top of the page. See Figure 179 UNA Score Assignment.

Assign Score Weightings to Node

To assign a score weighting to a node all that is needed is for the user to select the appropriate score type from the list box, enter their score weighting in the box and then select the node they wish to have that score type. This is done by clicking the “Assign Score Values” button. If the node already has a score type creating a new one should have no adverse effect other than to leave the data in the database in case it is ever needed again. See Figure 179 UNA Score Assignment.

Remove Score Weightings from Node

Removing the score weighting from a node is as simple as selecting the appropriate node and then clicking the “Clear Score Values” button. This will remove the association between the current template and the selected node. See Figure 179.

Finally whilst modifying a template if no changes have been made since the last save then it is possible to modify the scores of the template by clicking “Other” in the in-page menu, then clicking “Assign Score Values”. See Figure 172.

SEF Builder

Every centre should have their own assigned Self Evaluation Form (SEF).

SEFs are created via templates. Templates define the layout and questions that make up the forms and are reusable. The actual form created from a template is the **SEF**. Many SEFs may use a single template.

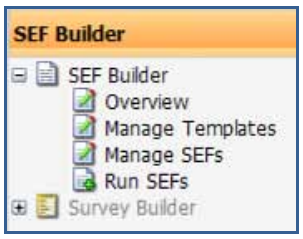


Figure 180 SEF Builder Menu

Manage Templates

Any authorised users can maintain Templates using the **Manage Templates** menu under the SEF Builder menu.

Selecting the Manage Template menu will list the existing Templates in a grid:

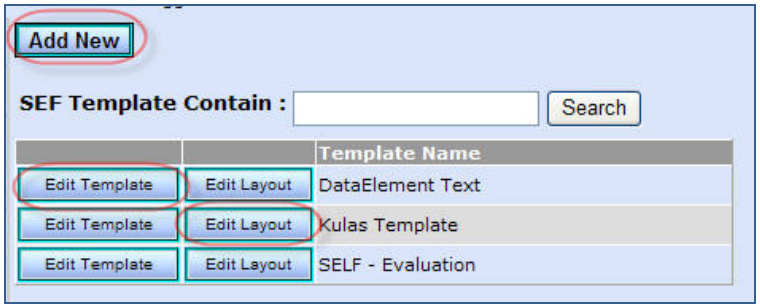


Figure 181 SEF Existing Templates Grid

You can rename an existing Template by clicking the corresponding **Edit Template** button.

You can update the layout of the Form/ questionnaire by clicking the corresponding **Edit Layout** button.

Click the **Add New** button display the following screen to add a New Template:

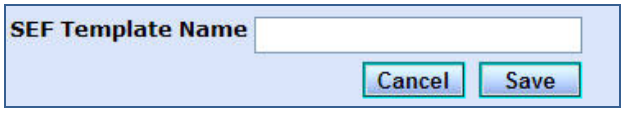


Figure 182 SEF Template Name

You can enter your preferred template Name and click the **Save Button** to create a new empty template.

Build or Update a Template

Clicking an **Edit Layout** button will display the following screen, with details relevant to the template you have selected:

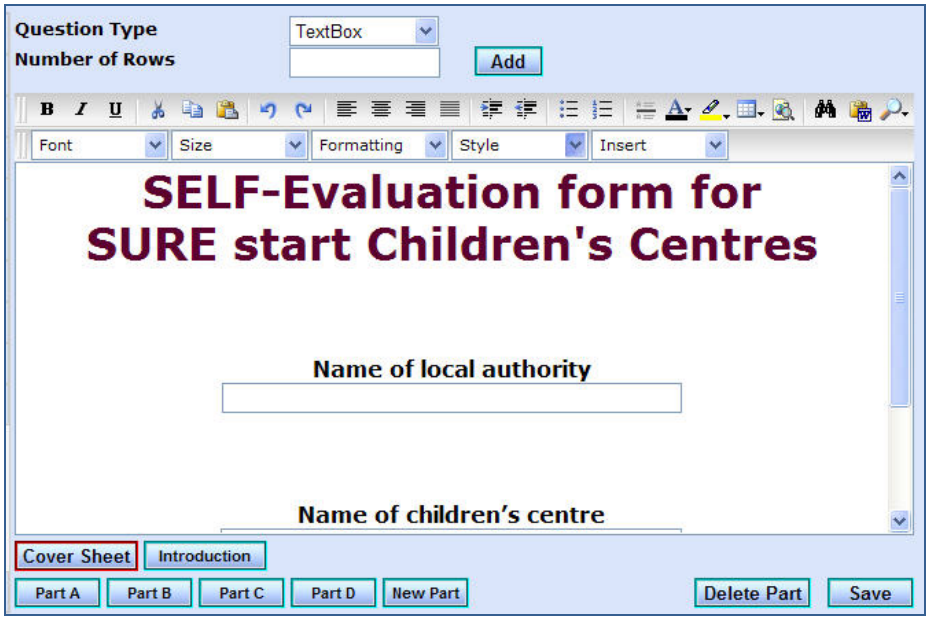


Figure 183 SEF Edit layout screen

The SEF Builder allows you to build a cover sheet, introduction section and up to ten sections (A - J). The sections are where you will build your questions.
Each question should have an answer type i.e. a text box, radio buttons, check buttons or allow you to insert an existing 'DataElement' selectable from the **Question Type** box.

You can introduce a page break by typing **<#PageBreak#>** which will cause a break onto a new page on printing.

Make sure you click Save.

Manage SEFs

A **SEF** is the actual form created from the template. Many SEFs may use a single template.

e.g. If you have a template named Customer Feedback you may create forms titled Customer Feedback 2008 and Customer Feedback 2009 from the Customer Feedback Template.

Any authorised users can manage SEFs using the **Manage SEFs** option under the SEF Builder menu

Create or Update a SEF

When you click on Manage SEFs, the main window lists the existing SEFs in a grid as follows:

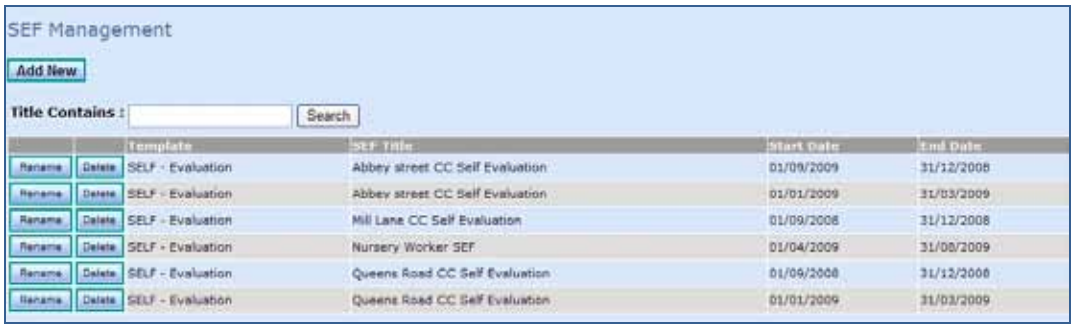


Figure 184 Adding a New SEF

The name and dates of an existing SEF can be modified by choosing the corresponding **Rename** button, which displays the following:

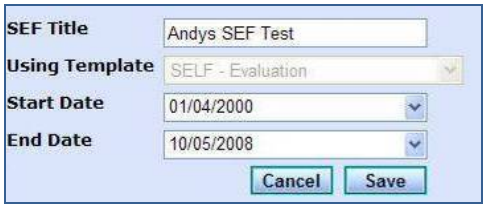


Figure 185 Edit SEF

You **cannot** change the assigned Template at later stage. If you have just added a new SEF you will not be able to rename it or change the dates until you have logged out of eStart and logged back in again.

A new SEF can be added by clicking the **Add New** button to display the following:

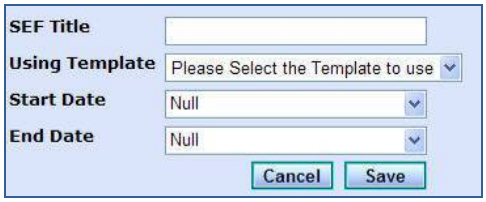


Figure 186 New SEF

Enter the SEF title, choose the template to use and select the start and end dates. Click the **Save** button to create your new SEF.

Run SEFs

Any authorised users can access SEFs from the **Run SEFs** option under the SEF Builder menu.

Selecting Run SEFs will display the following:

Figure 187 Choosing a SEF Setting

Select the setting from the **Setting** drop down. This will display all the SEFs available for the selected centre as below.

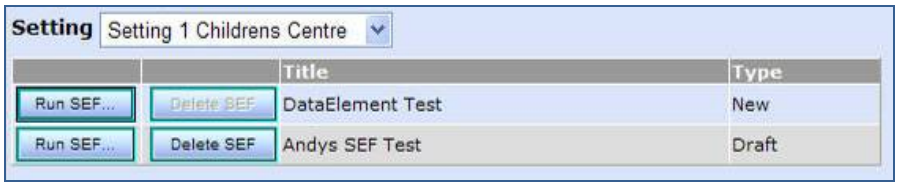


Figure 188 Run SEF for Selected Setting

Clicking the **Run SEF** button allows you to complete the SEF for the selected centre as follows:

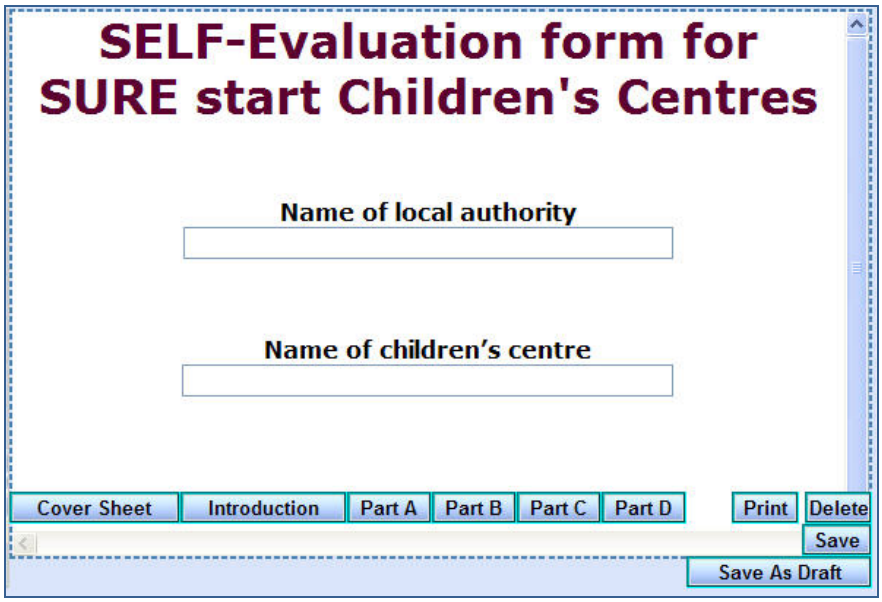


Figure 189 SEF Printed Version

You may create a printed version by clicking the **Print** button. To get a clean copy **remove the Header and Footer** from your **browsers Page Setup**.

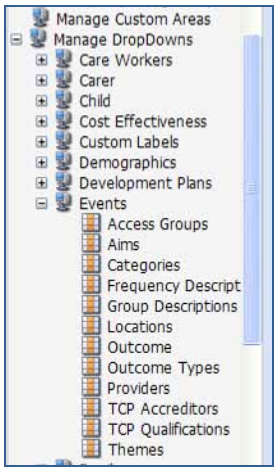
TCP

TCP stands for Training Centre Plus and is designed to empower Carers wishing to get into or return to the workplace by providing valuable marketable skills and, in some instances qualifications.

TCP is a replacement of the old Job Centre Plus. Within the TCP module you can create courses which comprising of any number of events run by your children's centre.

Setting up Accreditors and Qualifications

Whilst it is possible to add a TCP Course without populating any of these fields, you will probably want to pre-populate these fields which appear on the **Add Course** form. If you do not have the correct permissions to access this area then you will have to ask an eStart Administrator to do this for you.



Within the Admin menu, open Manage Dropdowns, then Events.

Figure 190 Setting TCP Accreditors and Qualifications

To add an Accreditor, click on TCP Accreditors in the left hand menu and click the **Add** button.

Figure 191 Adding a TCP Accreditor

To add a Qualification, click on TCP Qualifications in the left hand menu and click the **Add** button.

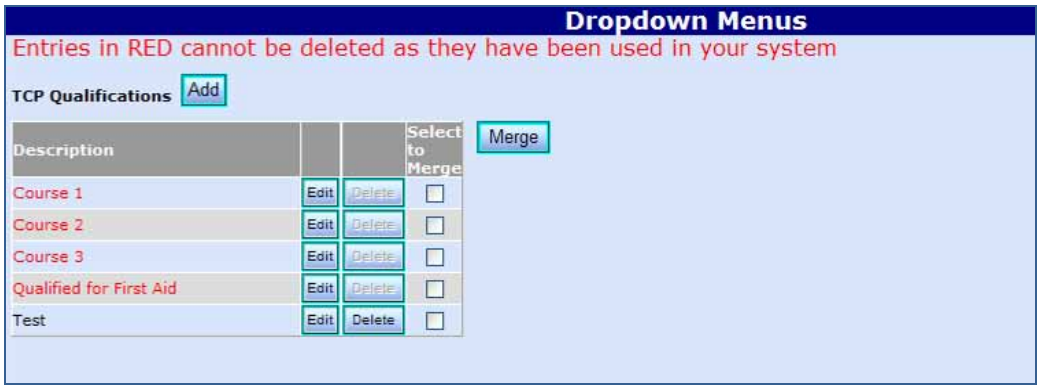


Figure 192 Adding a TCP Qualification

When you have set up qualifications and accreditors they will appear on the **Add TCP Course** screen which will be available for any event type defined as a TCP event.

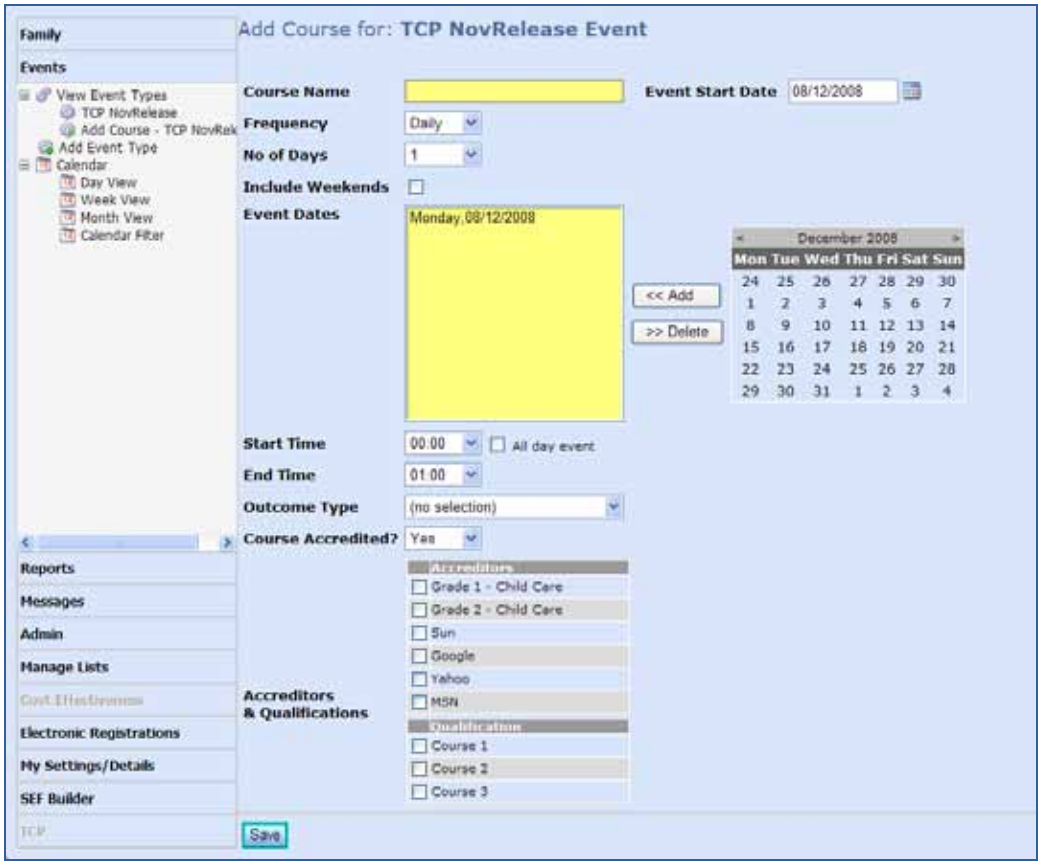


Figure 193 Add TCP Course screen with Accreditors and Qualifications

Add a TCP Course

To add a new TCP course, go to the Main Menu and click **Events** then **View Event Types** to display the **Event Type List** screen.

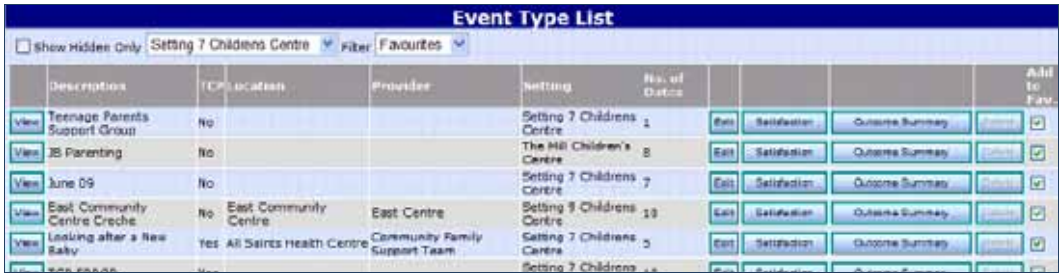


Figure 194 Event Type List

Click the **View** button against a suitable TCP Event then click **Add Course** in the left hand menu.

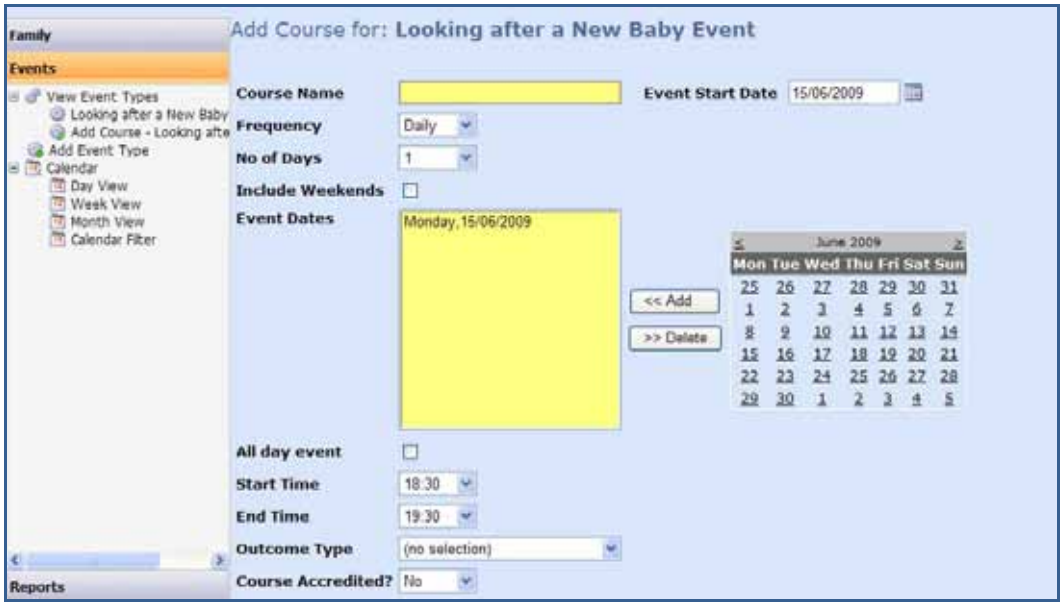


Figure 195 Adding a TCP Course

Before you can save or Add/Delete an Event Date, a course name is required.

If you have set up accreditors and / or qualifications (see above) then they will appear if you select **Yes** from the **Course Accredited?** dropdown.

Edit TCP Course

To edit a TCP course, go to the Main Menu and click Events then View Event Types to display the Event Type List screen - see Figure 194.

Click the View button on a TCP event then click the **Edit** button.

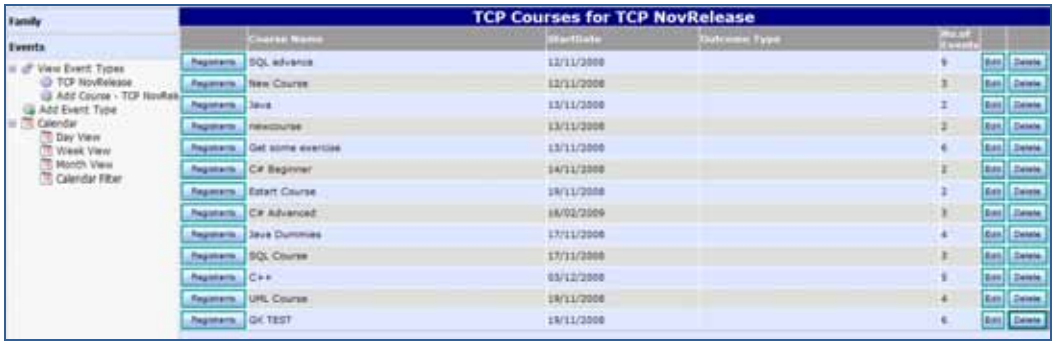


Figure 196 Edit a TCP Course

When updating, all the Event Dates which have not been saved will be displayed in the Event Date list box with a light blue background. For example, in Figure 197 below, “Friday 03/07/2009” (Friday 12/06/2009 is dark blue because it has been clicked on to select it). The default Start Time will be whatever has been specified on the page. Notice here that this course now has "Course Accredited?" set to **Yes**, so the Accreditors and Qualifications can be selected if some have been set up.

You can also delete a TCP Course date from this screen.

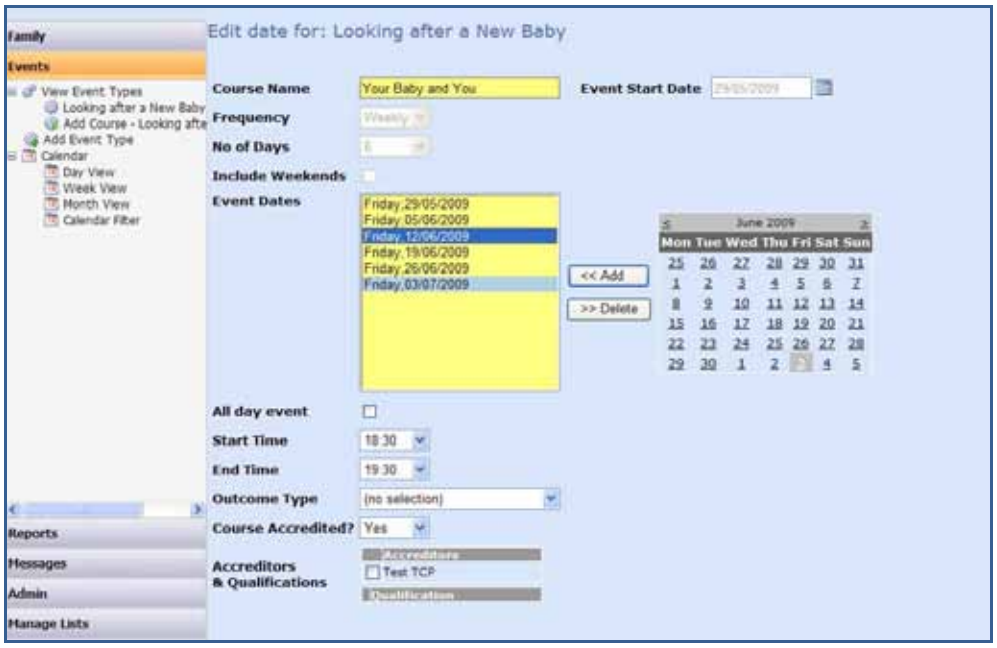


Figure 197 Deleting a TCP Course

Registrants

Registrants can be Members, Care Workers or Attendees. To Add, Edit or Delete Registrants go to the Main Menu and click Events then View Event Types to display the Event Type List screen - see Figure 194.

Click the **View** button on a TCP event then click the **Registrants** button against a TCP Course (see Figure 196) to display a screen as below:

Figure 198 TCP Registrants Screen

- Each TCP Course requires a minimum of one **Member** and one **Care Worker**.
- You can move between the **Members**, **Care Workers** and **Attendees** tab without losing any data, however, the Members search result will disappear when moving between the tabs (but not any members on the registrants list).
- All Members are Carers (there should be no children).

On the **Care Worker** tab the Settings drop down list acts as a filter on available Care Workers.

Figure 199 TCP Care Workers tab

The **Attendees** tab will not display any data until the Members and Care Workers have been saved.

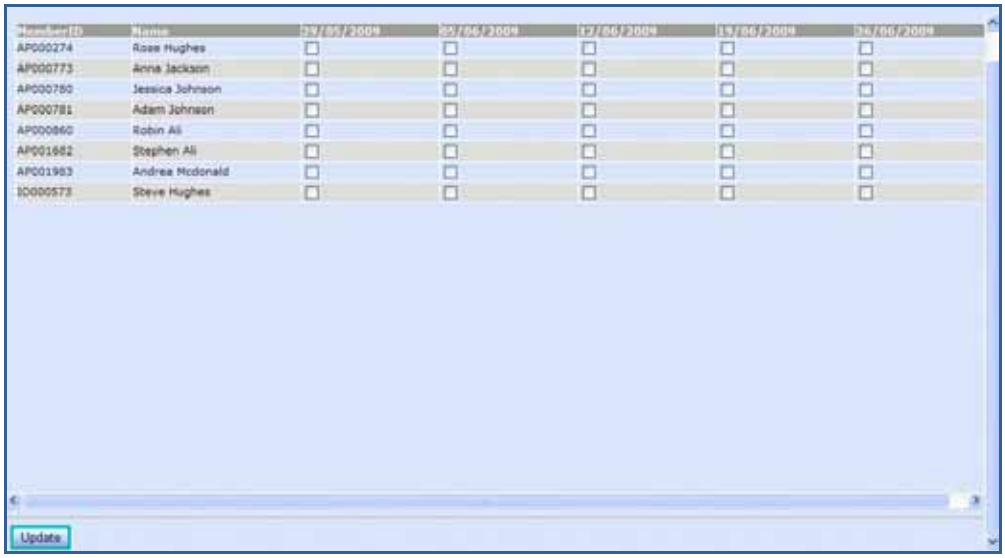


Figure 200 TCP Attendees tab

On the Attendees tab you can then tick any course events (dates) that the carer/s registered for that course have attended, before clicking **Update** (you might have to scroll down to the bottom of the screen using the right hand side scroll bar to see the Update button).

Carer TCP Courses

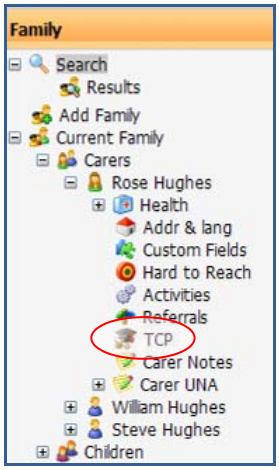


Figure 201 Carer TCP Section

Search for the family then click on **Carers** in the left hand menu, then on the name of the actual Carer.

This icon represents Carers who have a TCP (Training Centre Plus) course.

To add a TCP course for the selected Carer, select **TCP** from the left hand menu.

When you click the TCP icon on the left hand side menu, the following screen is displayed.

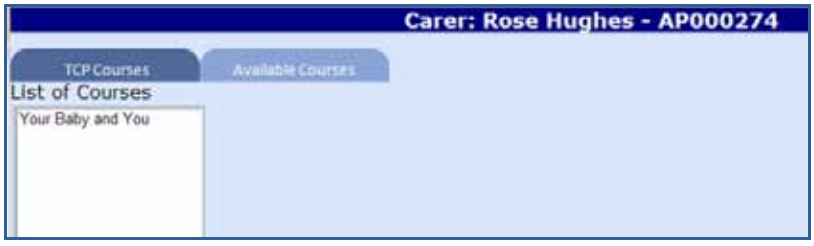


Figure 202 TCP Courses tab

If the carer has not yet attended any courses this will be indicated on-screen.

Click the **Available Courses** tab to see the courses which will run today or on any future date.

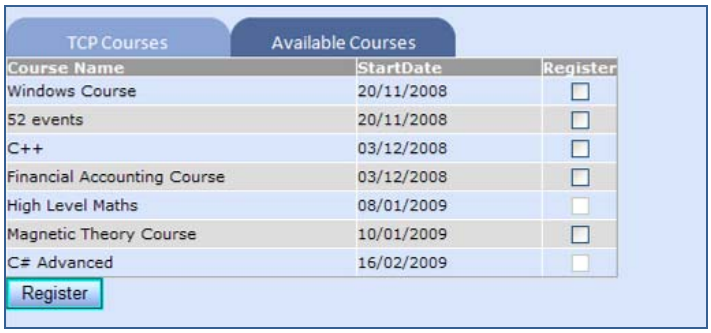


Figure 203 TCP Available Courses tab

The Available Courses tab shows the Course Name, Start Date, and a Register box. The **Register** tick box indicates whether or not the course is available and allows you to register the carer onto the course.

- If the box is empty and has a pale outline then it has not yet been enabled and the course is not available to register the carer. In order to enable the tick box you need to go to the Events section to add Members and Care Workers to this course.
- If the box has a dark outline then it is enabled and you can register the carer to the course.

After you tick the **Register** box you should click the **Register** button to save this carer to this course. A pop up message will be displayed:

When you click OK, the screen will now be displayed as below. Note that the **Registered** tick box is now ticked and disabled for the selected courses:

Figure 204 TCP Available Courses tab with Registered Courses

If you click the register button without selecting any course, this following message is displayed:

Click the TCP Courses tab to see the saved courses.

To see details of the course dates and carer attendance, select one of the courses from the list box.

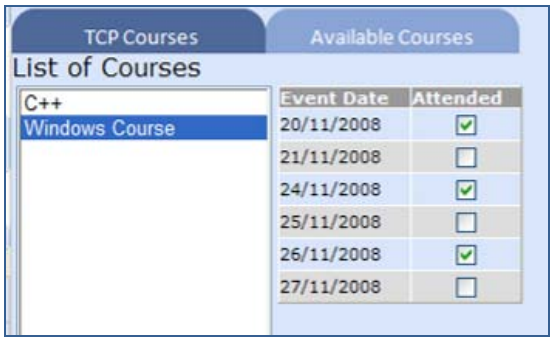


Figure 205 Carer TCP Course Date and Attendance details

Reports

Reports Overview

The Reports section within eStart provides a method to produce a wide variety of reports to suit your needs. The Reports menu can be found on the left hand side of eStart.

Figure 206 Reports tree view menu

For descriptions of all the eStart Reports please see **Appendix B: eStart Reports - Extended Descriptions** on page 116.

Types of Report

There are two kinds of reports.

Reach

The output is determined on an individual count, e.g. if an individual is seen at an event six times, attended six different events or three events twice each, they will only be counted once; this will be shown as 1.

Event Details **are not** included in Reach reports since the details will not match the numbers of people attending.

Volume

The output is determined on the amount of times an individual appears, e.g. if an individual is seen at an event six times, attended six different events or three events twice each; this will be counted 6 times.

Event Details **are** included in Volume reports since showing the details of these reports will match the number of people attending.

Children Reports

Children Seen (Reach)	Children seen between dates (No details on events)
Children Seen (Volume)	Children seen between dates (With details on events)
Children Seen By Age (Reach)	Children seen between dates grouped by Age Range (No details about events)
Children Seen By Age (Volume)	Children seen between dates grouped by Age Range (With details about events)
Children Seen By Activity (Reach)	Children seen between dates grouped by Activities (No details on events)
Children Seen By Activity (Volume)	Children seen between dates grouped by Activities (With details on events)
Children Seen By Activity With Anonymous	Children seen between dates, grouped by Setting and Events. The total number of Anonymous Children attending each event is also shown. Both Active and Inactive Children are included.
Children Now Registered	Children registered, only includes active members
Children Now Registered By Ethnicity	Children registered grouped by Ethnicity (Active members only)
Children Now Registered By Disability & Special Needs	Children that are registered with a Disability or Special Needs (Active members only)
Births of Children	Shows birthdays, weights and names of children born within date range
Births of Children by Weight	Births of children grouped by weight, born between date range

Carer Reports

Carers Seen (Reach)	Carers seen between dates (No details on events)
Carers Seen (Volume)	Carers seen between dates (With details on events)
Carers Seen By Activity (Reach)	Carers seen between dates grouped by Activities (No details on events)
Carers seen By Activity (Volume)	Carers seen between dates grouped by Activities (With details on events)
Carers seen By Activity With Anonymous	Carers seen between dates, grouped by Setting and Events. The total number of Anonymous Carers attending each event is also shown. Both Active and Inactive Carers are included.
Carers Now Registered	Carers registered, only includes active members

Family Reports

Monthly Summary Members Seen (Reach)	Monthly Summary of Carers & Children Seen grouped by Activity (counting each member once per Activity).
Monthly Summary Members Seen (Volume)	Monthly Summary of Carers & Children Seen grouped by Activity (counting each attendance at Activity).
Families Now Registered	This shows Families currently Registered (only active families shown)
Mail Merge Families Registered	Mail Merge Families Registered
Summary of Members Seen (Reach)	Summary of Families Carers and Children Seen Grouped by Activity (Counting each Family, Carer child once for each activity).
Families Seen(Reach)	Families Seen between dates no details about Events.
Summary of Members Seen (Volume)	Summary of Families Carers and Children Seen Grouped by Activity (Counting each attendance).

UNA Reports

UNA	The latest assessment for each member of each family.
UNA of Family by SCI Scores	This report displays the most recent UNA and the SCI related Items. The naming of the Score Type needs to include **SCI** for the SCI Classification of each UNA to be displayed.
UNA Blank Form	This report displays all the UNA Question Items with the information of the Family and Members at the header of the report. Enter a valid Family ID and select **Blank Form** to see this report.
UNA by SCI Scores	This report shows the scores of the SCI Score Type for each UNA Carer. The naming of the Score Type needs to include **SCI** and Score Type Details will need to be entered for this report to be displayed.
UNA by Smoking Scores	This report shows the scores of the Smoking (Nicotine Dependency) Score Type for each UNA carer. The naming of the Score Type needs to include the word **Nicotine**. Score Type Details also need to be entered for this report to be displayed.
UNA Score Types	This report shows UNA Score Types with the scores of the registered members grouped by Family ID.
Completed UNAs	This report shows completed UNAs by registered members grouped by Template Type and Family ID. There is an option to view it in Summary format.
UNA Items	This report shows selected UNA Items by registered members grouped by Template Type & UNA Items. There is an option to view it in Summary format.
UNA Items by Carers with %	This report displays the number of carers who have answered the UNA Item and includes a percentage of all the UNA carers in the authority. The Date Range is the UNA Created Date. It also includes several Summary Tables.
UNA Members with >3 Addresses	This report records all members with either a child or carer UNA, who have moved address. This is logged when the Change Address option is selected under the Family Details and will only include the Family Address. The Move Date needs to be selected when entering a new address as this report will only pick up address changes with a Moving In date. The report is grouped by Registered at Setting then sorted by age.

For detailed descriptions of all the UNA Reports please see **Appendix A: UNA Report Descriptions** on page 116.

Registration Reports

Carers Joining	Shows Carers who joined between dates Active and non Active Carers shown).
Children Joining	Shows Children who joined between dates (Active and non Active Children shown). All Children displayed in this report must have a DOB entered.
Carers And Children Joining	Shows Carers And Children who Joined between dates (Active and non Active members shown).
Families Joining	Shows Families who joined between dates (Active and non Active Families shown).

Event Reach/Volume Reports

Events Outcome	Shows the Outcome of Events Occurring between dates.
Events(Reach)	Shows the members who attended Events between dates (without details about individual Events).
Events(Reach) by Ethnicity	Shows the members who attended Events between dates grouped by ethnicity (without details about individual Events).
Events(Reach) By Activity	Shows the members who attended Events between dates grouped by Activity (without details about individual Events).
Events(Volume)	Shows the members who attended Events between (with details about individual Events).
Events(Volume) By Activity	Shows the members who attended Events between dates grouped by Activity (with details about individual Events).
Events By Activity With Anonymous	Members seen between dates, grouped by Setting and Events. The total number of Anonymous Members attending each Activity is also shown. Both Active and Inactive Members are included.
Members Seen by Ethnicity	Ethnic Group Reach and Volume totals, including Percentages, by Setting and Area. Both Active and Inactive Members are included.
Provider with Events (Basic)	Reach Totals for Members and Families for Events, by Setting and Provider. Both Active and Inactive Members are included.
Provider with Events (Detailed)	Reach Totals for Members and Families for Events, by Setting, Provider and Family. Both Active and Inactive Members are included.
Members Seen by Provider	Reach, Volume and Anonymous Volume totals showing totals for Family Breakdown, Ethnicity, Disabilities, Teenage Parents, Lone Parents, Setting and children Age Range. Both Active and Inactive Members are included.
Members Seen by Provider and Setting	Reach and Volume totals showing totals for Children Seen, Carers Seen, Families Seen, Fathers Seen, Parents with Disabilities, Children with Disabilities, Lone Parents, Teenage Parents and Ethnic Minorities by Setting. Both Active and Inactive Members are included.

Non Attendance Reports

Children Not Seen	Shows children not seen between dates (Active children only).
Carers Not seen	Shows carers not seen between dates (Active carers only).
Appointments Missed	Report shows members and the events that they have missed, by Setting and between Dates. Both Active and Inactive Members are included.
Mothers Not Seen	Mothers Not Seen during first two months after a birth (that occurred between dates).
Children Who No Longer Attend Their Registered/ Affiliated Setting	Shows children not seen between dates (Active children only) at the settings to which they are registered/affiliated. If there is **no** Event then the child **will** be included in the report. If there **is** an Event then the child **will not** be included in the report.
Carers Who No Longer Attend Their Registered/ Affiliated Setting	Shows carers not seen between dates (Active carers only) at the settings to which they are registered/affiliated. If there is **no** Event then the carer **will** be included in the report. If there **is** an Event then the carer **will not** be included in the report.

Pregnancy and Birth Reports

Pregnant Teenager Now Registered	Pregnant Teenagers Now registered (Active teenagers only).
Pregnant Women Seen (Reached)	Pregnant Women seen between dates (no details about Events). Both Active and Inactive Women are included.
Births of Children	Shows birthdays, weights and names of children born within date range
Births of Children by Weight	Births of children grouped by weight, born between date range

Breast Feeding Reports

Records Of Breast Feeding	Shows the breast feeding of children in their first year (includes all children born between date range who have active Mothers)

Health Reports

Smoking Records	Shows birthdays, weights and names of children born within date range
Births of Children by Weight	Shows the smoking of carers (only includes those who are still Active and who have smoked).

Care Worker Reports

Care Workers and Events Summary(Reach)	Shows the number of different members who Visit each Care worker between dates.
Care Workers and Events Summary(Volume)	Shows the number of Visits that each Care Worker has between defined dates.
Care Workers and Events(Reach)	Shows Care Workers and members attending their Events between dates (No details about events shown).
Care Workers and Events(volume)	Shows Care Workers, their Events and members attending between dates (details about Events shown).
Care Workers and Hours worked at Events	Shows the duration in Hours and Minutes, Care Workers have worked at Events

Development Plan Reports

Dev Plans & Due Dates	Shows the Development Plan Milestones and whether the Target Dates have been met, including Late Reasons. This report contains 2 Summary Tables.
Care Workers Working with Dev Plan Targets	Shows the Development Plan Milestones and their Due Dates handled by Care Workers.

Sure Start Reports

M3 (Registered at requested Settings)	Sure Start monthly government report giving data on children, pregnant women and babies who are Registered at requested Settings.
M3 (Seen at requested Settings)	Sure Start monthly government report giving data on children and pregnant women who are Seen at requested Settings.
M7	Sure Start yearly government report giving statistics on key targets.
NCH Section 1	This reports on individuals seen at selected sites.
NCH Section 2	This reports on families and Referrals

Custom Fields

Custom Reports	Show Custom fields (or Labels) with members.

Hard To Reach Reports

Hard To Reach Reports	Shows Hard to Reach fields (or Labels) with members.

Events by Aims Reports

Event Type	Shows the Event Group and Description by Setting, grouped by the Event Aim. Both Active and Inactive Members are included.
Children Reach	Report shows Children reached by Event Aim and Setting. Both Active and Inactive Members are included.
Children Volume	Report shows Children volumes by Event Aim and Setting. Both Active and Inactive Members are included.

Audit Logs

Audit Log	This report shows the records audited by Users through the Family screens. It also lists the access attempts of Family IDs. ONLY Manage Console Users can run this report.

Quarterly Profiles

Quarterly Profile Main	Shows high level Reach and Volume Members Seen totals, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.
Quarterly Profile Outcomes	Shows high level Reach and Volume Members Seen totals, by Outcome Types and Individual Outcomes, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.
Quarterly Profile Themes	Shows high level Reach and Volume Members Seen totals, by Themes, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.

Custom Query Report

Holds all the custom reports that are created by the Capita helpdesk. These reports are created on request.

Report Criteria

Once a report has been selected you then need to select the criteria for the report as in the example below:

Figure 207 Report Criteria.

Seen At Setting/Affiliated

Filters the report to a particular setting or range of settings where the family is registered. Some reports allow you to select the settings affiliated to families.

Living At

This option provides the facility to filter the report to families living in a certain Setting, Post Area, Super Output and Custom Area.

Date Range

Provides the facility to limit the report results to a specified date range.

Disability, Ethnicity, Sex, Age and Member ID

Filter the report by selecting any of the above criteria.

Activities

This allows you to filter the report to a particular Event, Event Reporting Group and Groups.

When any of the button options are selected a new box appears showing the selection parameters. These will be filtered to the chosen setting.

Running a Report

There are three options available when running a report:

Run

This runs the report; an output will be produced from your parameters.

Export to Excel

The report will be exported in .csv (Comma Separated Values) to Microsoft Excel.

Summary

If you select the summary option eStart will only return the Summary section of the report.

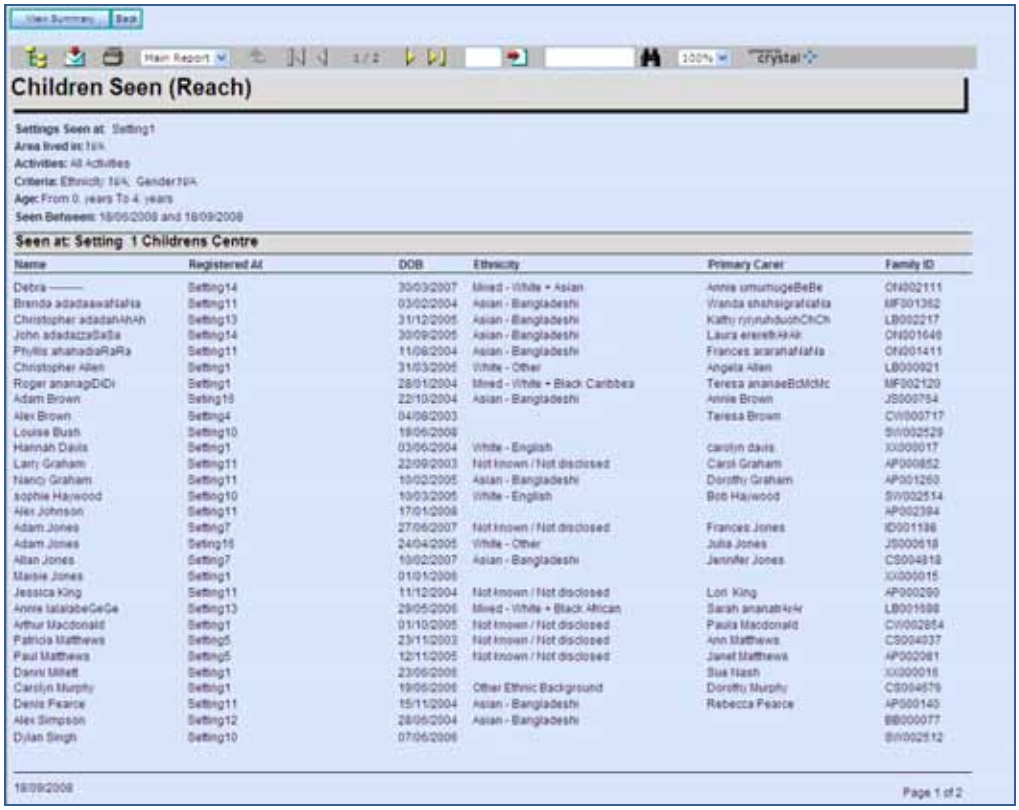


Figure 208 Reports Summary screen.

Report Toolbar

Figure 209 Reports Toolbar.

The reports toolbar allows you to further manipulate results. The toolbar allows report data to be exported to various formats, print reports and search through records.

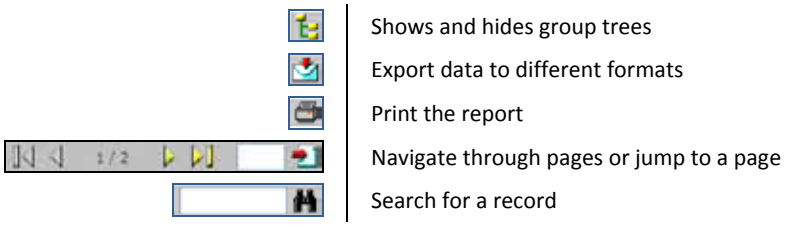

1 / 2
Shows and hides group trees
Export data to different formats
Print the report
Navigate through pages or jump to a page
Search for a record

Figure 210 Reports Toolbar Icons.

Exporting a Report

This function allows the report to be exported in the following formats:

- Crystal Reports (RPT)
- Acrobat Format (PDF)
- MS Word
- MS Excel 97-2000
- MS Excel 97-2000 (Data Only) only data is extracted, formatting is dropped.
- Rich Text Format

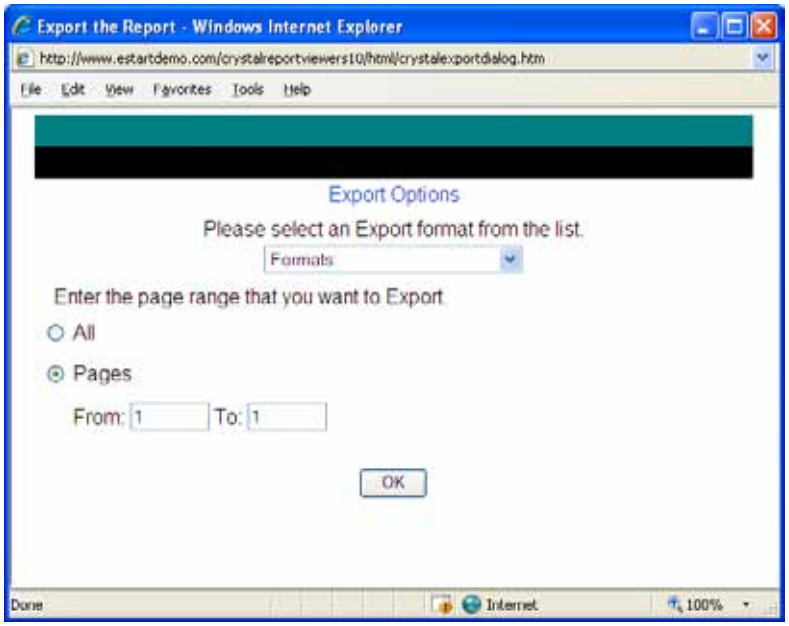


Figure 211 Reports Export Options screen.

Appendix A: eStart Reports - Extended Descriptions

Reach and Volume Reports

Some reports will have the same report name but differ by being labelled as **Reach** or **Volume**.

- A **Reach** report counts an individual Member or Family once e.g. if a child attended Tumble Tots Event every week over 6 weeks at Setting 1 and Story Time twice at Setting 2, it will be counted as 1 Child for each Setting as well as only 1 Child for the two Settings in total. The Main Total of the Summary Table will not add up for the Reach reports.
  Event Details **are not** included in Reach reports since the details will not match the numbers of people attending (e.g. they attended two events but are only counted once).
- A **Volume** report would count 6 for Setting 1 and 2 for Setting 2 in the example above. For the two Settings, the Volume count would be 8. The subtotal and total in a Volume count Summary Table will add up logically.
  Event Details **are** included in Volume reports since showing the details of these reports will match the number of people attending.

Children Category

Children Seen (Reach) Report

This report shows the individual numbers of children seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting. It does not include information on the Event Activities attended. Both Active and Inactive children are displayed.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and End Date)
- Disabled
- Ethnicity
- Gender
- Age (by year or month) set to 0 – 4 years by default
- Member ID
- Consent Given
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

A Summary Table of Children Seen from the selected Settings is included in this report.

An Area based Summary Table can be seen in this report if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the Main Total could vary from manually adding up the subtotals. The bar chart displays the Reach subtotals for each Setting but not the Reach Setting Total.

Children Seen (Volume) Report

This report shows the number of times children have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting. It does not include information on the Event Activities attended but it does show the Event Date. Both Active and Inactive children are displayed.

The report options are the same as the children Seen (Reach) Report above.

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

Children Seen by Age (Reach) Report

This report shows the individual numbers of children seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Age. It does not include information on the Event Activities attended. Both Active and Inactive children are displayed.

The report options are the same as for the Children Seen (Reach) Report.

A Setting based Summary Table and bar chart is included with this report.

An Area based Summary Table and Bar chart can be seen, if one of the options has been selected for Living At.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. The Main Total could, therefore, vary from manually adding up the subtotals.

Children Seen by Age (Volume) Report

This report shows the number of times children have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Age. It does not include information on the Event Activities attended but it does show the Event Date. Both Active and Inactive children are displayed.

The report options are the same as for the Children Seen (Reach) Report.

A Setting based Summary Table and Bar chart is included with this report.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for **Living At**.

Children Seen by Activity (Reach) Report

This report shows the individual numbers of children seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Event Activity. Both Active and Inactive children are displayed.

The report options are the same as for the Children Seen (Reach) Report.

A Setting based Summary Table and Bar chart is included with this report and displays a Reach subtotal for each Activity.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number could vary from manually adding up the subtotals. A Setting based Summary Table and bar chart is included with this report and it displays a Reach subtotal for each Activity.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for **Living At**.

Children Seen by Activity (Volume) Report

This report shows the number of times children have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Event Activity. Both Active and Inactive children are displayed.

The report options are the same as for the Children Seen (Reach) Report.

A Setting based Summary Table and bar chart is included with this report and it displays a Volume subtotal for each Activity.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table count of the times a Child member has been seen for each Activity at a Setting or Area.

Children Seen by Activity with Anonymous Report (Volume)

This report shows the number of times children have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Event Activity. Both Active and Inactive children are being displayed.

The report options are:

- Seen at Setting
- Event Date Range
- Gender
- Activities

This report also shows the numbers of Anonymous Children Seen at the Event Activity.

A Setting based Summary Table is included in this report and counts the number of times children have attended each event.

Children Now Registered Report

This report gives a list of children registered in the selected Settings from the date the report is run. A child's information will only show if both the Child and the Family are currently active.
It is grouped by Living at (if this option has been selected), and then Registered at Setting.

Contact Address Information with Contact Numbers can be seen with the Child information if the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.
The name of the Carer will be next to the Address if a Primary Carer has been set up for the Child, otherwise the name of the Child will appear next to it.

The report options are:

- Registered at Setting
- Affiliated
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Disabled
- Ethnicity
- Gender
- Age (by year or month) – set to 0 – 4 years by default
- Consent Given

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for Living At.

The main total of the Summary Table calculates a distinct count of one individual Child at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

The Total of each Setting is a Reach count of each Child, therefore if a Child's Family is affiliated to two other Settings, then it will still be counted as 1 Child for the Total that represents ALL Settings.

Children Registered by Ethnicity Report

This report gives a list of children registered by Ethnicity in the selected Settings from the date the report is run. A child's information will only show if both the Child and the Family are currently active.
It is grouped by Living at (if this option has been selected), and then Registered at Setting followed by Ethnicity.

The report options are the same as for the Children Now Registered Report, above.

Contact Address Information with Contact Numbers can be seen with the Child information if the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The name of the Carer will be next to the Address if a Primary Carer has been set up for the Child, otherwise the name of the Child will appear next to it.

A Setting based Summary Table and bar chart is included with this report.

An Area based Summary Table and Bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual Child at a Setting or Area. Hence, the number can vary from manually adding up the subtotals. The totals are a count of Children by Ethnicity and Setting/Living At. If a Child's Family is affiliated to two other Settings then it will still be counted as 1 Child for the Total that represents ALL Settings.

Children Registered by Disability & Special Needs Report

This report gives a list of children registered by Disability and Special Needs in the selected Setting/Settings from the date the report is run. A child's information will only show if both the Child and the Family are currently active.

It is grouped by Living at (if this option has been selected), and then Registered at Setting followed by Disability and Special Needs.

Contact Address Information with Contact Numbers can be seen with the Child information if the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The name of the Carer will be next to the Address if a Primary Carer has been set up for the Child, otherwise the name of the Child will appear next to it.

The report options are the same as for the Children Now Registered Report.

A Setting based Summary Table and bar chart is included with this report.

An Area based Summary Table and Bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual Child at a Setting or Area, hence the number can vary from manually adding up the subtotals. The Total of each Setting is a Reach count of each Child, so if a Child's Family is affiliated to two other Settings then it will still be counted as 1 Child for the Total that represents ALL Settings.

Birth of Children Report

This report displays children born between the chosen Date Ranges of the Registered Setting. It shows all Active and Inactive Children where the Family status is **Active**.

It is grouped by Living at (if this option has been selected), and then Registered at Setting. Fields such as Birth weight, Gender, Ethnicity and Primary Carer of Child can also be seen should there be data for the particular child.

The report options are:

- Registered at Setting
- Living at
- Disability
- Gender
- Ethnicity

A Setting based Summary Table and bar chart is included with this report.

An Area based Summary Table and Bar chart can be seen, if one of the options has been selected for **Living At**.

Child Birth Weight Report

This report shows the Children born within the chosen Date Range. It shows all Active and Inactive Children where the Family status is **Active**.

It is grouped by Living at (if this option has been selected), and then Registered at Setting followed by the Birth weight range. Fields such as Birth weight, Gender, Ethnicity and Primary Carer of Child can also be seen should there be data for the particular child.

The report options of this report are the same as for the Birth of Children report, above.

Carers Category

Carers Seen (Reach) Report

This report shows individual number of Carers seen at the selected Children's Centre Settings within the chosen Event Date Range. Both Active and Inactive Carers who have attended an Event Activity are displayed.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting.

It does not include information on the Event Activities attended.

The Contact Address Information with Contact Numbers can be seen with the Carer information, if the Yes radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super Output Area/Custom Label
- Date Range (set against the Event Start and End Date)
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Teenager (less than 20 years at Event Date)
- Parent
- Lone Parent
- Currently Smoking
- Pregnant
- Consent Given
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

A Summary Table of Carers Seen from the Registered Settings is included in this report.

An Area Summary Table can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

The bar chart displays the Reach subtotals for each Setting but not the Reach Setting Total of all selected Settings.

Carers Seen (Volume) Report

This report shows the number of times Carers have been seen at the selected Children's Centre Settings within the chosen Event Date Range. Both Active and Inactive Carers are displayed.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting.

It does not include information on the Event Activities attended but it does show the Event Date.

The report options are the same as for the Carers Seen (Reach) Report.

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for Living At.

Carers Seen by Activity (Reach) Report

This report shows the individual number of Carers seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activity. Both Active and Inactive Carers are displayed.

The report options are the same as for the Carers Seen (Reach) Report.

A Setting based Summary Table and Bar Chart are included with this report, displaying a Reach subtotal.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

Carers Seen by Activity (Volume) Report

This report shows the number of times Carers have been seen at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activity. Both Active and Inactive Carers are displayed.

The report options are the same as for the Carers Seen (Reach) Report.

A Setting based Summary Table and bar chart are included with this report, displaying a Volume subtotal for each Activity.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for Living At.

The main total of the Summary Table is a count of the times a Child member has been seen for each Activity at a Setting or Area.

Carers Seen by Activity with Anonymous Report

This report shows the number of times Carers have been seen at the selected Children's Centre Settings within the chosen Event Date Range. This report also shows the numbers of Anonymous Carers seen at the Event Activity. Both Active and Inactive Carers are displayed.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activity.

The report options are:

- Seen at Setting
- Event Date Range
- Gender
- Activities

A Setting based Summary Table is included in this report and counts the number of times Carers have attended each event. This is a Volume count.

Carers Now Registered Report

This report gives a list of Carers registered in the selected Settings from the date the report is run. The information of a Carer will only show if both the Carer and the Family are currently active.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Consent Given
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Teenager (less than 20 years at Event Date)
- Parent
- Lone Parent
- Currently Smoking
- Pregnant
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

Contact Address Information with Contact Numbers can be seen with the Carer information if the Yes radio button has been selected for Contact Info. Otherwise, the Mail Merge option shows only the Contact Address information.

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

The main total of the Summary Table calculates a distinct count of one individual Carer at a Setting or Area. Hence the number can vary from manually adding up the subtotals. The Total of each Setting gives a Reach count of each Carer. If a Carer's Family is affiliated to two other Settings, then it will still be counted as one Carer for the Total, representing ALL Settings.

Families Category

Families Seen (Reach) Report

This report shows a count of individual Families having attended an Event Activity at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting. It does not include information on the Event Activities attended. Both Active and Inactive Families are displayed.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (defined by Event Start and End Date)
- Disabled
- Ethnicity
- Employed
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

A Summary Table of Families Seen from the selected Settings is included in this report.

An Area Summary Table can also be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual family at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

The bar chart displays the Reach subtotals for each Setting but not the Reach Setting Total.

The Address Contact Information can either be selected with the Family Information or as a Mail Merge on its own.

Families Seen (Volume) Report

This report shows the number of times Families have attended Events at the selected Children's Centre Settings within the chosen Event Date Range.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting. It does not include information on the Event Activities attended but it does show the Event Date. Both Active and Inactive families are displayed.

The report options are the same as for the Families Seen (Reach) report.

A Setting based Summary Table and bar chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for **Living At**.

The Address Contact Information can be selected either with the Family Information or as Mail Merge on its own.

Families Now Registered Report

This report gives a list of Families registered in the selected Setting/Settings from the date the report is run. The information of the Main Carer will only show with the Children of that Family. The Members as well as the Family have to be active.

It is grouped by Living at, if it has been chosen, and then Registered at Setting.

The Disabled, Ethnicity and Consent Given options are also available to be selected before running the report. All Family Members have to have been set to **No Consent Given** before this Family is seen as not having given Consent.

Contact Address Information with Contact Numbers can be seen with the Main Carer information if the Yes radio button has been selected for Contact Info. Otherwise, the Mail Merge option shows only the Contact Address information.

A Setting based Summary Table and Bar chart is included with this report.

An Area based Summary Table and bar chart can be seen, if one of the options has been selected for Living At.

The main total of the Summary Table calculates a distinct count of one individual Family at a Setting or Area, hence, the number can vary from manually adding up the subtotals.

The Total of each Setting is a Reach count of each Family. If a Family is affiliated to two other Settings, then it will still be counted as one Family for the total that represents ALL Settings.

Mail Merge Families Registered

This report will output directly a Mail Merge list Family Addresses with Contact Number Information as well as the Family IDs.

The Family has to have an Active status.

The Carer Name shown will be the one that has been set as the Main Correspondent. The Consent Given depends only on this Carer, hence not all Family Members need to have withheld their consent in order for this Family to be displayed when the **No Consent Given** option is selected. The title will also show which Consent Given option has been selected before running the report.

The report options are the same as for the Families Now Registered report, although due to the fact that it is a Mail Merge report, it does not group on Living at or Registered at Settings.

Monthly Summary Members Seen (Reach) Report

This report displays the number of individual Carers and Children Seen at the selected Children's Centre Setting, within the Event Date Range, in a Summary Table format. Both Active and Inactive Carers & Children, with Active or Inactive Family status, are being displayed.

The report is first grouped by Living At, should it have been selected, then by Seen at Setting.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and End Date)
- Disabled
- Ethnicity
- Activities

The count of each individual Member seen at the Event Activity is by each month. If the same Member has attended (for example) three Activities in the Setting, then as a Reach count that Member will only be counted as one Member reached in that Month's total.

Monthly Summary Members Seen (Volume) Report

This report displays the number of Carers and Children Seen at the selected Children's Centre Setting, within the Event Date Range, in a Summary Table format. Both Active and Inactive Carers & Children, with Active or Inactive Family status, are displayed.

The report is first grouped by Living At, should it have been selected, then by Seen at Setting.

The report options are the same as for the Monthly Summary Members Seen (Reach) report.

The number of times the member has been seen at each Event Activity is counted and displayed by each month in the Summary Table. For example, a Child attending two different Event Activities over three weeks in one month would be counted as six. This is a Volume count.

All Members have to have attended an Event and both active and non active members can be seen.

Summary Members Seen (Reach) Report

This report displays the number of individual Carers, Children and Families Seen at the selected Children's Centre Setting, within the Event Date Range, in a Summary Table format. Both Active and Inactive Carers & Children, with Active or Inactive Family status, are displayed.

The report is first grouped by Living At (if it has been selected), then by Seen at Setting.

The report options are the same as for the Monthly Summary Members Seen (Reach) report.

The Summary table shows the number of individual Carers, Children and Families who have been seen at each Event Activity. If the same Member has attended (for example) three different Event Activities over several weeks in the Setting, then as a Reach count that Member will only be counted as one Member reached for the Main Total.

All Members or Families have to have attended an Event and both active and non active members and families can be seen here.

Summary Members Seen (Volume) Report

This report displays the number of Carers and Children Seen at the selected Children's Centre Setting, within the Event Date Range, in a Summary Table format. Both Active and Inactive Carers and Children, with Active or Inactive Family status, are displayed. All Members or Families need to have attended an Event

The report is first grouped by Living At (if it has been selected), then by Seen at Setting.

The report options are the same as for the Monthly Summary Members Seen (Reach) report.

The Summary table shows the number of individual Carers, Children and Families that have been seen at each Event Activity. The number of times a Family has been seen at each Event Activity is counted in the Summary Table. For example, a Family attending two different Event Activities over three weeks in one month would be six. This is a Volume count.

UNA Category

See also Appendix B on page 153 for more information about UNA reports.

UNA Report

This is the first report in the UNA Category. It shows information about the Family and also names each member of the Family. The UNA report shows the UNA Question Items selected from the latest UNA that each member of the Family has answered.

A valid Family ID has to be entered.

Run the **UNA Blank Form** report to obtain a report with a list of all UNA Question Items.

UNA of Family by SCI Scores Report

The UNA of Family by SCI (Social Capital Index) Scores report is similar to the UNA report, above. This report only shows the selected SCI Question Items from the Carer UNA of the Family. The last page also shows the SCI Scores with Classification of all the Carer UNAs in the Family.

The Score Type name needs to contain SCI and the Score Details Classification has to be set up for this last page to show.

A valid Family ID has to be entered.

Run the **UNA Blank Form** report to obtain a report with a list of all UNA Question Items.

UNA Blank Form Report

This report displays all the UNA Question Items with the information about the Family and Members in the header of the report.

Enter a valid Family ID in the field and select the Blank Form check box option to run this report. If only a valid Family ID has been entered before running the report, then the Family information with the Members information will be displayed in the header and all UNA question items will be listed with ticks against the ones that have been answered by the Family Members.

UNA by SCI Report

The UNA by SCI (Social Capital Index) report displays information from Carers of each UNA with Scores and Classification, who are registered at a Children's Centre Setting within the UNA Creation Date Range.

The report options are:

- Registered at Setting
- UNA Creation Date Range
- Living at (by Setting, Postcode, Super Output Area or Custom Label)

If Super Output Area has been selected for the Living At report option, then the IMD and IDACI Ranking and Score will be listed underneath the Super Output Area, if they have been filled in via Admin > Manage Dropdowns > Postcodes/Settings > Super Output Areas in eStart.

The Score Type name needs to include **SCI** and the Score Details Classification must be set in order for data to be displayed on this report, therefore **SCI** must not be included in other Score Type names.

The maximum score a UNA with SCI Question Items can obtain is 100.

UNA by Smoking Score Report

The UNA by Smoking Score report needs to have the Registered at Children's Centre Setting and the UNA Creation Date Range selected before running the report.

Living at (by Setting, Postcode, Super Output Area or Custom Label) is an optional selection.

The Score Type name needs to include **Nicotine** and the Score Details Classification must be set in order for data to be displayed on this report, therefore **Nicotine** must not be included in other Score Type names.

The report shows the Score and Classification of each UNA answered by the Carer. The Creation Date of the UNA can be seen next to the Score.

The highest score that can be obtained is 10.

UNA by Overweight Score Report

The UNA by Overweight Score must have the Registered at Children's Centre Setting and the UNA Creation Date Range selected before running the report.

Living at (by Setting, Postcode, Super Output Area or Custom Label) is an optional selection.

The Score Type name needs to include **Overweight** and the Score Details Classification must be set in order for data to be displayed on this report, therefore **Overweight** must not be included in other Score Type names.

There are currently ten Question Items that can count towards the Likelihood of being Overweight. Members can select one or many Question Items under Depression and this will count as one however many have been selected. The same applies to Mental Health. The other eight are all counted as one. The maximum score a UNA with Overweight Question Items can obtain is ten for each Family. It can, however, exceed ten if the UNA Creation Date Range is wide and so many UNAs with Likelihood of being Overweight Question Items have been selected for the report.

UNA Score Types Report

The UNA Score Types report shows Members grouped under their Registered Setting and Score Type. It also displays the UNA Creation Date although this is not given as a Date Range option before running the report.

Living at (by Setting, Postcode, Super Output Area or Custom Label) is an optional selection.

It is also possible to see the Address Contact Information of the family by choosing the option under Contact Info before running the report.

The Classification of the Score Type can be seen, if it has been filled in, otherwise it will be blank next to the score. The Score is a sum from the selected Items assigned for the Score Type. The Score type of Likelihood of being Overweight is not included in this report; you must run the UNA by Overweight report if you wish to see information for that Score Type.

Completed UNAs Report

The Completed UNAs report shows completed UNAs grouped by Template Type with information about the Members. It also displays the UNA Creation Date and Completed Date.

A UNA must have a Completed Date for it to be listed in this report.

Living at (by Setting, Postcode, Super Output Area or Custom Label) is an optional selection.

It is also possible to see the Address Contact Information of the family; choose the option under **Contact Info** before running the report.

UNA Items Report

The UNA Items report lists the Members who have selected Question Items in their UNAs which have been chosen before running this report e.g. if you select a Registered at Setting, then Under 5 A Day and click **Never** and **Every Day**, this report will then show members who have answered these two options.

The report will be grouped by Registered/Living At Setting and then the Template type followed by the Question Item. It can be seen whether Members of the same Family have answered the same Question Item.

This report includes a Summary table that can be displayed via the Summary button in the report or by ticking the Summary check box when running the report.

UNA Items by Carers with % Report

The UNA Items by Carers with % report shows two percentage calculations: It works out the number of times Carers have selected the Question Item, by their UNA Created Date, against the number of Carers there who have had UNAs created in the same Date Range of the chosen Settings.

It does not just count the latest UNA created and it will count the same Carer twice if two UNAs have been created within the chosen Date Range.

This is a Volume count report.

The last column (coloured brown) calculates the number of times Carers have selected the Question Item against all the Carers in all the Settings, with UNAs created in the selected Date Range.

The report options are:

- Registered at Setting
- Living At
- UNA Created Date Range

This report includes three Summary tables that can be displayed via the Summary button in the report or by ticking the Summary Check Box when running the report. The third Summary table only appears if an option has been selected for Living At and this Summary Table counts the number of times the Question Item has been selected by the Area and Category within the UNA Creation Date Range.

UNA Members with >3 Addresses Report

The UNA Members with More Than Three Addresses report records all Members with either a Child or Carer UNA, who have moved address.

This is logged when the Change Address option is selected under the Family part and will only capture the Family Address.

The Move Date needs to be selected when entering a new address as this report will only pick up address changes with a Move In date.

The report is grouped by Registered at Setting and it is then sorted by age.

Registration (Joining) Category

Families Joining Report

The Families Joined report shows the Families who have joined the Setting within the Date Range. Both active and inactive Families will appear in this report.

If the name of the mother and surname of the Primary Carer have been added for the Family, these will be included. Otherwise this will be blank. The number of Children within that Family will also be displayed.

Contact Address Information with Contact Numbers but without any Contact Name can be seen, when the Yes radio button has been selected for Contact Info.

The report options are:

- Registered at Setting
- Living at: Setting/Postal Area/Super Output Area/Custom Label
- Date Range (set against the Family Joined Start and End Date)
- Disabled
- Ethnicity

A Summary Table of the Families Joined from the chosen Registered Settings is included in this report.

An Area Summary Table can be seen if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual family at a Setting or Area. The bar chart displays the Reach subtotals for each Setting but not the Total of all Settings.

Carers & Children Joining Report

The Carers and Children Joining report shows the Members who have joined the Setting within the Date Range. Active and inactive Members from active or inactive Families will appear in this report.

A Member Type column allows you to distinguish between Carers and Children. Carers or Children will appear in this report even if they have not filled in their Date of Birth.

The report options are:

- Registered at Setting
- Living at: Setting/Postal Area/Super Output Area/Custom Label
- Date Range (set against the Family Joined Start and End Date)
- Disabled
- Ethnicity
- Gender

A Summary Table of the Carers and Children joined from the chosen Registered Settings is included in this report.

An Area Summary Table can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. The bar chart displays the Reach subtotals for each Setting but not the Total of all Settings.

Carers Joining Report

The Carers Joined report shows the Carers who have joined the Setting within the Date Range. Active and inactive Carers from active or inactive Families will appear in this report.

Carers will appear in this report even though they may not have filled in their Date of Birth, unless the Teenager report option has been selected before running.

Contact Address Information with Contact Numbers but without any Contact Name can be seen, when the **Yes** radio button has been selected for Contact Info.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super Output Area/Custom Label
- Date Range (set against the Start and End Date)
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Teenager (less than 20 years at Event Date)
- Parent
- Lone Parent
- Currently Smoking
- Pregnant

A Summary Table of the Carers joined from the chosen Registered Settings is included in this report.

An Area Summary Table can also be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual Carer at a Setting or Area. The bar chart displays the Reach subtotals for each Setting but not the Total of all Settings.

Children Joining Report

The Children Joined report shows the Children who have joined the Setting within the Date Range. Active and inactive Children with an active or inactive Family status will appear in this report.

Children will **not** appear in this report if their Date of Birth has not been entered.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Start and End Date)
- Disabled
- Ethnicity
- Gender
- Age (by year or month) set to 0 – 4 years by default

A Summary Table of the Children joined from the chosen Registered Settings is included in this report.

An Area Summary Table can be seen in this report if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual Child at a Setting or Area. The bar chart displays the Reach subtotals for each Setting but not the Total of all Settings.

Event Reach/Volume Category

Events (Reach) Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen dates.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting. It does not include information on the Event Activities attended.

Both Active and inactive Members within active and inactive Families are displayed in this report.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and End Date)
- Disabled
- Ethnicity
- Gender
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

Summary Tables of Members Seen at Events from the selected Settings are included in this report.

The first Summary Table is grouped as rows by Event Months and then Member Type with the Seen at Setting set as columns.
A second Summary Table, based on Area, can be seen in this report if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number could vary from manually adding up the subtotals. The bar chart displays the Reach subtotals for each Setting but not the Total of ALL Settings.

Events (Volume) Report

This report shows the number of times Members have attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates. Both Active and inactive Members within active and inactive Families are displayed in this report. It does not include information on the Event Activities attended.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting.

The report options are the same as for the Events (Reach) report, above.

Summary Tables of Members Seen at Events from the selected Settings are included in this report.

The first Summary Table is grouped as rows by Event Months and then Member Type with the Seen at Setting set as columns.
A second Summary Table, based on Area, can be seen in this report if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.

The bar chart displays the subtotals for each Setting but not the Total of ALL Settings.

Events (Reach) by Activity Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates. Both Active and inactive Members within active and inactive Families are displayed in this report.
The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activities.

The report options are the same as for the Events (Reach) report.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report.

- The first Summary Table is grouped with the rows as Event Activities and the Seen at Setting set as columns.
- The second Summary Table is also for Setting but includes the Event Month as a further group.
- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.
- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number can vary from manually adding up the subtotals. The bar chart displays the Reach subtotals for each Setting but not the Total of ALL Settings.

Events (Volume) by Activity with Anonymous Report

This report shows the number of times Members have attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates. Both Active and inactive Members within active and inactive Families are displayed in this report.
It includes the number of Anonymous Members who have attended Event Activities.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Event Activities.

The report options are:

- Seen at Setting
- Date Range (set against the Event Start and End Date)
- Gender
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

The report options are the same as for the Events (Reach) report, except that it does not include Living at, Disability and Ethnicity.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report:

- The first Summary Table is grouped with the rows as Event Activities and the Seen at Setting set as columns.
- The second Summary Table is also for Setting but includes the Event Month as a further group.
- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the Living At report option.
- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

Events (Reach) By Provider Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates, by Provider.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Provider and then Event Activity. Both Active and inactive Members within active and inactive Families are displayed in this report.

Various subtotals are provided with this report. Even though it is a Reach report (which only counts once when an individual Member attended several Event Activities over several Providers), it does show Volume subtotals. The Volume subtotals all have a light coloured background and they count the number of times a Member has attended an Event, even if it is for the same Event Activity.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report.

- The first Summary Table is grouped with the rows by Provider and the Seen at Setting set as columns.
- The second Summary Table is also for Setting but includes the Event Month as a further group.
- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.
- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

A bar chart for the Setting by Provider and a bar chart for the Area by Provider are at the last two pages of the Summary View option.

Events (Reach) By Location Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates, by Location.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Location and then Event Activity. Both Active and inactive Members within active and inactive Families are displayed in this report.

Various subtotals are provided with this report. Even though it is a Reach report (which only counts once when an individual Member attended several Event Activities over several Locations), it does show Volume subtotals. The Volume subtotals all have a light coloured background and they count the number of times a Member has attended an Event, even if it is for the same Event Activity.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report.

- The first Summary Table is grouped with the rows by Location and the Seen at Setting set as columns.
- The second Summary Table is also for Setting but includes the Event Month as a further group.
- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.
- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

A bar chart for the Setting by Location and a bar chart for the Area by Location are at the last two pages of the Summary View option.

Events (Reach) By Theme Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates, by Theme.

The report is grouped first by Living At, if this option has been selected, and then Registered at Setting followed by Theme and then Event Activity. Both Active and inactive Members within active and inactive Families are displayed in this report.

Various subtotals are provided with this report. Even though it is a Reach report (which counts only once when an individual Member attended several Event Activities over several Themes), it does show Volume subtotals. The Volume subtotals all have a light coloured background and they count the number of times a Member has attended an Event, even if it is for the same Event Activity.

Four Summary Tables of Members Seen at Events from the selected Settings are included in this report.

- The first Summary Table is grouped with the rows as Location and the Seen at Setting set as columns.
- The second Summary Table is also for Setting but includes the Event Month as a further group.
- The third Summary Table, based on Area, can be seen in this report, if a Setting, Postal Area, Super output Area or Custom Label has been selected for the **Living At** report option.
- The fourth Summary Table can be seen when the Living at option has been selected and includes the additional Event Month grouping.

A bar chart for the Setting by Theme and a bar chart for the Area by Theme are at the last two pages of the Summary View option.

Events (Reach) By Ethnicity Report

This report shows a count of individual Members who attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates, by Ethnicity.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by Theme. It does not include information on the Event Activities attended. Both Active and inactive Members within active and inactive Families are displayed in this report.

The report options are the same as for the Events (Reach) report.

Three Settings based Summary Tables and one Living at Summary Table are included with this report.

- The first Summary Table is grouped by Ethnicity and Member Type with the Setting information running horizontally across.
- The second Summary Table is by Setting and Ethnicity.
- The third is grouped by Ethnicity, Setting and then Member Type.
- The fourth Summary Table will only appear, if the Living at option has been selected as a report option. This Summary Table is simply grouped by Ethnicity with the chosen Settings running horizontally across.

All the Summary Tables calculate a Reach total, which only counts an individual Member once even when they have visited several Event Activities over several Children's Centre setting.

The Setting and Area bar charts are by Ethnicity.

Events (Reach) by Outcome Report

This report shows a count of individual Members who have attended an Event Activity at the selected Children's Centre Settings between the chosen Event Dates. It includes a column showing the Outcome Type of the Event Activity.

The report is grouped first by Living At (if this option has been selected), and then Registered at Setting followed by the Event Activity.

The subtotals show a Volume Count of Members who have attended all the Event Dates without (coloured blue) and with the Anonymous members who attended (coloured green). Both Active and inactive Members within active and inactive Families are displayed in this report.

The report options are the same as for the Events (Reach) report.

There is only one Summary Table for this report. It is grouped by Setting and Event Activity as rows with the Outcome Type and Outcome Descriptions horizontally.

Members Seen by Ethnicity Report

This report shows both Reach and Volume totals and percentages, for both Active and Inactive Members, seen within the selected Date Range.

The report is grouped by Living At, if selected, Seen at Setting and then Ethnicity.

The total number of active Families Registered within the Setting is shown in the Setting totals.

The report options before running the report are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and End Date)

Summary tables showing Reach totals exist for this report, the format depends on whether Living At has been selected.

Providers with Events (Basic) Report

This report shows both Reach and Event Volume totals, for both Active and Inactive Members and Families, seen within the selected Date Range.

The report is grouped by Seen at Setting, Provider and Event. The Care Workers associated with each Event are shown.

This report uses drop downs that allow for multiple selections of Care Workers, Events and Providers.

The report options before running the report are:

- Seen at Setting
- Date Range (set against the Event Start and End Date)
- Care Workers
- Events
- Providers

Providers with Events (Detailed) Report

This report shows both Reach and Event Volume totals, for both Active and Inactive Members and Families, seen within the selected Date Range.

The report is grouped by Seen at Setting, Provider, Event and Family. The Care Workers associated with each Event are shown.

This report uses drop downs which allow for multiple selections of Care Workers, Events and Providers.

The report options before running the report are:

- Seen at Setting
- Date Range (set against the Event Start and End Date)
- Care Workers
- Events
- Providers

Members Seen By Provider Report

This report shows Reach, Volume and Anonymous Volume totals, where appropriate, for both Active and Inactive Members, seen within the selected Date Range.

The report is grouped by Report Type. The report options before running the report are:

- Seen at Setting
- Date Range (set against the Event Start and End Date)
- Providers

The Report shows totals for Family Breakdown, Ethnicity, disabilities/Special Needs, Teenage Parents, Lone Parents, Settings and Age Range of Children.

Members Seen By Provider and Setting Report

This report shows Reach, Volume and Anonymous Volume totals, where appropriate, for both Active and Inactive Members, seen within the selected Date Range.

The report is grouped by Seen at Setting.

The report options before running the report are:

- Seen at Setting
- Date Range (set against the Event Start and End Date)

The Report shows totals by Setting for the following categories: Children Seen, Carers Seen, Families Seen, Fathers Seen, Carers with Disabilities Seen, Children with Disabilities Seen, Lone Parents Seen, Teenage Parents Seen and Ethnic Minorities Seen.

Non Attendance Category

Children Not Seen Report

This report shows the number of individual Children who have **not** attended an Event Activity within the Date Range. Only Children who are active, with an active Family status, can be seen in this report.
The Date Joined and DOB fields of the Child need to be filled in for this report.

The report is grouped by Living At (if this option has been chosen), followed by Seen at Setting.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Start and End Date)
- Disabled
- Ethnicity
- Gender
- Age (by year or month) set to 0 – 4 years by default

It includes two Summary Tables that count the number of individual Children who have not attended an Event Activity and they are either by Setting or Area (Living At).

The Area Summary Table will only show, if the **Living At** option has been selected.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area, hence the number can vary from manually adding up the subtotals.

Carers Not Seen Report

This report shows the number of individual Carers who have not attended an Event Activity within the Date Range. Only Carers who are active with an active Family status can be seen in this report.The Date Joined field of the Carer must be filled in for this report to appear.

The report is grouped by Living At (if this option has been chosen), followed by Seen at Setting.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and End Date)
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Teenager (less than 20 years at Event Date)
- Parent
- Lone Parent
- Currently Smoking

It includes two Summary Tables that count the number of individual Carers who have not attended an Event Activity. These are by Setting and Area (Living At).

The Area Summary Table will only show if the Living At option has been selected as a report option. The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area. Hence, the number can vary from manually adding up the subtotals.

Appointments Missed

This report shows the Appointments missed by Carers and Children. It displays the Event Activity Name and Event Date. The Count of Appointments missed includes all the times Carers or Children have not attended an Event Activity that they have been registered on within the selected Event Date Range.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and End Date)
- Member Type
- Disabled
- Ethnicity
- Gender

It includes two Summary Tables that count the number of times Carers or Children have not attended an Event Activity and they are either by Setting or Living At. The second Summary Table (by Area) will only show if the **Living At** option has been selected.

Mothers Not Seen

This report shows the number of Mothers who have not attended an Event Activity for which they were registered. The Events all took place during the first two months after the birth of their child. It will only show the Mothers who are active and also have an Active Family status.

The report is grouped by Living At (if this option has been chosen), followed by Seen at Setting.

The report options are the same as for the Carers Not Seen report.

It includes two Summary Tables that count the number of individual Mothers who have not attended an Event Activity, by **Setting** and by **Area** (Living At).
The Area Summary Table will only show if the **Living At** option has been selected. The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area, hence the number can vary from manually adding up the subtotals.

Children Who No Longer Attend Their Registered/Affiliated Setting

This report shows children who have not attended a setting to which they are registered or affiliated.

For each setting it reports all children who are registered or affiliated, and who have not attended any course or event in the last 90 days. Only children who were registered or affiliated more than 89 days ago will be reported.

The report can be run for a single setting, multiple settings or for all settings.

The report can be run for active children only, inactive children only, or both active and inactive children. If both active and inactive are chosen, a column is included on the report to show whether the child is active or not.

The report has a summary mode that will show the number of absent children at each setting.

The information on the Registration and Affiliations Details page is used to determine whether a child is registered or affiliated to a setting, and when that registration/affiliation started.

Carers Who No Longer Attend Their Registered/Affiliated Setting

This report is the same as for Children Who No Longer Attend Their Registered/Affiliated Setting (see above), but it is for carers

This report shows carers who have not attended a setting to which they are registered or affiliated.

For each setting it reports all carers who are registered or affiliated, and who have not attended any course or event in the last 90 days. Only carers who were registered or affiliated more than 89 days ago will be reported.

The report can be run for a single setting, multiple settings or for all settings.

The report can be run for active carers only, inactive carers only, or both active and inactive carers. If both active and inactive are chosen, a column is included on the report to show whether the child is active or not.

The report has a summary mode that will show the number of absent carers at each setting.

The information on the Registration and Affiliations Details page is used to determine whether a carer is registered or affiliated to a setting, and when that registration/affiliation started.

Pregnancy & Birth Category

Pregnant Teenagers Now Registered Report

This report gives a list of Pregnant Teenagers registered in the selected Setting/Settings from the date the report is run. Information will only be included if both the Pregnant Teenager and the Family are active.

It is grouped by Living at (if it has been chosen), and then Registered at Setting.

The Contact Address Information with Contact Numbers can be seen with the Pregnant Teenager information when the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The report options are:

- Registered at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set by the Start and End Date)
- Disabled
- Ethnicity
- Parent
- Lone Parent
- Currently Smoking
- Consent Given

A Setting based Summary Table and Bar Chart are included with this report.

An Area based Summary Table and bar chart can be seen if one of the options has been selected for Living At.

The main total of the Summary Table calculates a distinct count of one individual Pregnant Teenager at a Setting or Area. The Total of each Setting calculates a Reach count of each Pregnant Teenager. If a Pregnant Teenager's Family is affiliated to two other Settings, then it will still be counted as one Pregnant Teenager for the Total, representing ALL Settings.

Pregnant Women Seen (Reach) Report

This report shows the number of individual Pregnant Women seen at the selected Children's Centre Settings within the chosen Date Range.

The report is grouped first by Living At, if this option has been selected, then Registered at Setting. It does not include information on the Event Activities attended. Both Active and Inactive Pregnant Women who have attended an Event Activity are displayed.

The Contact Address information with Contact Numbers can be seen with the Carer information if the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Start and End Date)
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Parent
- Lone Parent
- Currently Smoking
- Consent Given

A Summary Table of Carers Seen from the Registered Settings is included in this report.

An Area Summary Table can be seen in this report if a Setting, Postal Area, Super Output Area or Custom Label has been selected for the **Living At** report option.

The main total of the Summary Table calculates a distinct count of one individual member at a Setting or Area, hence the number can vary from manually adding up the subtotals. The bar chart displays the Reach subtotals for each Setting but not the Reach Setting Total.

Births of Children Report

This is a short cut to the same report available in the **Children** category.

Birth of Children by Weight Report

This is a short cut to the same report available in the **Children** category.

Breast Feeding Category

Record of Breast Feeding Report

This report displays the information of each mother with her child and also shows five columns of information (Breastfed at Birth, at six weeks, at three months, at six months and at one year).

The Contact Address information with Contact Numbers can be seen with the mother's information, when the Yes radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The report is grouped by Living at (if it has been chosen), then Registered at Setting.

It includes a count of individual mothers for each Setting as well as each Area, and a general count of how many children have been breastfed in the various periods after the birth.

Health Category

Smoking Record Report

This report shows all the Carers with their Smoking Information, if they have ever smoked, within the Registered Settings. A tick for Smoking indicates that the Carer is still currently Smoking.

There is a check box report option to only show current Smokers of the chosen Registered at Setting or Settings. Additional Notes in the Smoking history can also be seen in this report.

The information is grouped first by Living at (if this has been selected), then Registered at.

The report options are:

- Seen at Setting/Registered at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Disabled
- Ethnicity
- Gender
- Relationship to Child
- Teenager (less than 20 years at Event Date)
- Parent
- Lone Parent
- Currently Smoking
- Pregnant
- Consent Given

The Totals are a Reach count, which means that an individual Carer is only counted once.

Births of Children by Weight Report

This is a short cut to the same report available in the **Children** category.

Careworker Category

Careworkers and Events (Reach) Report

This report is grouped by Seen at a Children's Centre Setting and the events attended by the Careworker as well as which members have attended.

The subtotal under the Event Activity that the Careworker instructed or participated in shows how many times it has occurred e.g. Baby Yoga over 6 weeks would be 6 times for this Event Activity. It also shows how many different members the Careworker has reached in a Setting as well as amongst all the Settings that they worked at.

This report is first grouped by Careworker and then by Registered at Setting.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and Event End Date)
- Careworker Surname (can enter the first few letters of a surname)
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

If many Careworkers work for a Setting, then a Surname (complete or in part) can be entered as a Report option to narrow down the output.

Careworkers and Events (Volume) Report

This report is grouped by Seen at a Children's Centre Setting and the events attended by the Careworker as well as which members have attended.

The subtotal under the Event Activity that the Careworker instructed or participated in shows how many times it has occurred e.g. Baby Yoga over 6 weeks would be 6 times for this Event Activity.

It also shows how many members the Careworker has reached in a Setting as well as amongst all the Settings that they worked at. For this report it is a **Volume** count of Members, so if a Member has attended several courses under the same Careworker over several weeks, then it will be counted as one for each time.

This report is first grouped by Careworker and then by Registered at Setting. The report options are the same as for the Careworkers and Events (Reach) report.

Careworkers and Events Summary (Reach) Report

This report shows the Summary Table immediately and is grouped by Settings seen at, followed by the Careworker and then separated into New and Existing Carers or Children.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and Event End Date)
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

The Summary Table counts how many individual New and Existing Carers or Children have been seen at the Setting for each Careworker. Carers and Children are classified as New when their own

Joined Setting Date is the same as the given Start Date. The Date Range is based on the Start and End Event Date.

Careworkers and Events Summary (Volume) Report

This report shows the Summary Table instantly and it is grouped by Settings seen at, followed by the Careworker and then separated into New and Existing Carers or Children.

The report options are:

- Seen at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Date Range (set against the Event Start and Event End Date)
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

The Summary Table counts how many times New and Existing Carers or Children have been seen for all the Event Activities at the Setting for each Careworker. Carers and Children are classified as New when their own Joined Setting Date is the same as the given Start Date. The Date Range is based on the Start and End Date.

Careworkers and Hours worked at Events Report

This report shows how long Careworkers have spent within the selected Date Range on Event Activities for a particular Setting. It also shows which members have attended the Event Activities.

The Event Duration needs to be entered in order for this report to give the time spent at each Event and Setting for a Careworker.

This report has the same report option as the Careworkers and Events (Reach) Report.

The Summary Table counts how many times the Careworker has been at each Event. The Subtotal and the Main total count the number of different Event Dates.

Members and Hours spent at Events Report

This report shows how long Members have spent within the selected Date Range on Event Activities for a particular Setting. It lists the Event Activities the Members have attended.

The Event Duration needs to be entered in order for this report to give the time spent at each Event and Setting of a Member.

This report has the same report option as the Careworkers and Events (Reach) Report.

The Summary Table counts how many times the Member has been attended an Event. The Subtotal and the Main total count the number of times the Events have occurred.

Development Plan Category

Dev Plans & Due Dates Report

This report shows the Development Milestones of Children from the chosen Setting and shows whether the Target Dates have been met. It also includes Late Reasons if this has been filled in. A Child's information will only show if the Child as well as the Family are both active.

The report is grouped by Development Plan followed by its Milestones. The Information of the Children with their Milestones and the Due Dates of them can be seen. Various Milestones should have been met over the months for each Child. The Date Range entered works out the Milestones that should occur for the Children. Children with a Development Plan and due Milestones registered to the Setting will appear in this report.

This report includes one Summary table and it shows the Completed status of each Milestone within the Date Range given.

The report options are:

- Registered at Setting
- Date Range (set against the Start and End Date)
- Ethnicity
- Gender

This report includes one Summary table, showing the Completed status of each Milestone within the Date Range given.

Care Workers working with Dev Plan Targets Report

This report shows the Development Plan Milestones and their Due Dates of Children registered at the chosen Setting for Care Workers. This helps with an overview of which Milestone Due Dates are scheduled for each Care Worker. A Child's information will only show if the Child as well as the Family are both active.

It displays a count of how many Milestones are due for each Care Worker.

The Development Plan needs to have a Care Worker assigned or it will appear under the unknown Care Worker grouping.

The report options are:

- Registered at Setting for the Children
- Date Range.

The Contact Address Information with Contact Numbers can be seen with the Child information if the **Yes** radio button has been selected for Contact Info. Otherwise, the Mail Merge option will show only the Contact Address information.

The total of the Summary Table calculates a distinct count for each individual Child. This means that if the Child has several Milestone targets due in the chosen Date Range then it will be counted only once. Hence, the number can vary from manually adding up the subtotals for this Reach type of Summary Table

Sure Start Category

M3 (Registered at requested Settings) Report

This supplies information for the government's M3 (Monthly Reach Information, selected months only) return.

This report divides the information displayed as for either New or Existing Members and Families registered in the chosen Setting over five different Summary Tables. This report was created to run monthly for the government return.

- The first Summary Table does a count of how many registered Children were seen from the selected Setting by their age.
- The second Summary Table shows these Children seen, divided by their Ethnicity.
- The third Summary Table is on various Female Carers seen.
- The fourth table is based on Families seen
- The fifth table is based on different Carers.

The report options are:

- Registered at Setting
- Event Date Range

This report also gives a count of births of babies in the Date Range.

M3 (Seen at requested Settings) Report

This supplies information for the government's M3 (Monthly Reach Information, selected months only) return.

This report divides the information displayed as for either New or Existing Members and Families seen in the chosen Setting over five different Summary Tables. This report was created to run monthly for the government report.

- The first Summary Table does a count of how many registered Children were seen from the selected Setting by their age.
- The second Summary Table shows these Children seen divided by their Ethnicity.
- The third Summary Table is on various Female Carers seen.
- The fourth table is based on Families seen
- The fifth table is based on different Carers.

The report options are:

- Seen at Setting
- Event Date Range

M7 Report

This report shows numerous targets that are required for the annual government return.

The report options are:

- Registered at Setting
- Event Date Range

NCH Section 1 Report

The first part of the report shows numbers of members registered at the selected Setting. Only active members are counted.

The report options are:

- Seen at Setting
- Event Date Range

The Summary Table on the left breaks down the Members seen by their Ethnicity groups and the right hand Summary Table is grouped by Age and Gender.

NCH Section 2 Report

This report shows information on families who are active as well as referrals made to the Setting. The report options are:

- Seen at Setting
- Event Date Range

Custom Fields Category

Custom Report

This report displays information about Children, Carers and Families grouped by Registered at Setting, the Member Type and the Custom Label. The report will also show if this is a Hard to Reach Label. Active and inactive Members and Families can be seen in this report.

The report options are:

- Registered at Setting
- Living at: Setting/Postal Area/Super output Area/Custom Label
- Member Type
- Ethnicity
- Gender
- Hard to Reach
- Custom Type Label
- Consent Given

A Setting based Summary Table is included with this report.

An Area based Summary Table can also be seen, if one of the options has been selected for **Living At**.

The Summary Tables are grouped by Setting, Member Type and Custom Labels. The total carries out a normal count of Members within each Custom Label i.e. if a Carer appears in three different Custom Labels then it will be three.

Hard to Reach Reports Category

Hard to Reach Report

The report displays information about Children, Carers and Families grouped by Registered at Setting, the Member Type and the Custom Label. Active and inactive Members and Families can be seen in this report.

The report only shows Hard to Reach Labels and does not include any Subtotals or Summary Tables.

The report options are:

- Registered at Setting
- Living at: Setting/Postal Area/Super Output Area/Custom Label
- Member Type
- Ethnicity
- Gender
- Hard to Reach

Events by Aims Category

Event Type Report

This report shows what Event Aims have been set up for Event Activities catering for Carers. It also displays which Event Group the Event Activity is linked to.

The report options are:

- Registered at Setting
- Event Date Range
- Activities: Event Reporting Group/Group/Event/Provider/Location/Theme/Outcome Type/Access Group

Two Summary Tables are included in this report. One is grouped by Setting and Event Aims and the second one also includes the Event Group.

Children Reach Report

This report shows the Event Aims that have been set up for the Event Activities that Children have attended. It also displays which Event Group the Event Activity is linked to. Active and inactive Children will appear in this report.

The report options are the same as for the Event Type Report, above.

Two Summary Tables are included in this report. One is grouped by Setting and Event Aims and the second one also includes the Event Group.

Children Volume Report

This report shows the Event Aims that have been set up for the Event Activities that Children have attended. It also displays which Event Group the Event Activity is linked to and the Event Date.

The report options are the same as for the Event Type Report, above.

Two Summary Tables are included in this report. One is grouped by Setting and Event Aims and the second one also includes the Event Group. It does a count of every time a Child has attended an Event Activity with an Aim.

Audit Logs

Audit Log Report

⚠ Only Users set as Console Managers are able to access the Audit Logs category and Audit Log report.

This report shows a New Value changed or added by a User on the Family, Carer or Child screens.

The Log Type dropdown option before running the report allows the report to display only Audited, Accessed or All information.

The **Audit** section of the report is grouped by the User who has made changes to the Family screens. It lists the Family ID and Date/Time when the audit occurred along with the name of the field and the previous and new value.

The information displayed for the **Access** section will only list the Family ID and Date/Time when the search occurred. It is also grouped by User.

The report options before running the report are:

- Seen at Setting
- Date Range (set against which Start and End Date)
- Log Type
- User Name

Quarterly Profiles Category

Quarterly Profile Main Report

This report shows high level Reach and Volume Members Seen totals, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.

The Report is grouped by Centre, with a Summary option available. The Summary Reach totals are NOT the sum of the Centre Reach totals, but have been calculated as the overall Reach totals, i.e. a Member that has attended both Centre 1 and Centre 2 within the quarter will only be counted as one.

Both Active and Inactive Members are reported.

The following Measures, by Quarter, are reported, if the data is available:

- Number of Events held
- Number of Weekday (Daytime) Events held *(Events with start times before 18:00 hrs)*
- Number of Weeknight Events held *(Events with start times from 18:00 hrs onwards)*

- Number of Weekend Events held
- Number of Families Registering
- Number of Families Affiliating
- Volume All
- Volume Carers
- Volume Children under 5 *(Under 5 at the time of the Event)*
- Volume Children 5 – 18 yrs
- Volume Children (No DOB recorded) *(Ensures child records with no DOB are included)*
- Reach All
- Reach Carers (All)
- Reach Carers (Female)
- Reach Carers (Male)
- Reach Carers (No Gender Recorded) *(Included to ensure all totals add up)*
- Reach Carers with Special Needs
- Reach Carers – Fathers
- Reach Carers with Disability
- Reach Carers Employed
- Reach Carers Unemployed
- Reach Carers Lone Parent
- Reach Carers Teenage Mothers or Pregnant Teenagers
- Reach Children Under 5 *(Under 5 at the time of the Event)*
- Reach Children 5 – 18 Years
- Reach Children (No DOB recorded) *(Ensures child records with no DOB are included)*
- Reach Children in workless Households
- Reach Children in BME Groups *(Totals exclude White UK/Irish, Refused or Not obtained)*
- Reach Children with Disability
- Reach Children with Disabled Parents
- Reach Children with Special Needs
- Reach Children with Parents with Special Needs

The report options before running the report are:

- Seen at Setting
- Quarter

Please be aware of the following:

- **Select the Quarter you wish to report as "This Quarter". The "Previous Quarter" and "This Quarter Previous Year" Dates will be calculated automatically.**
- As tables containing affiliation details were only added in a recent release, this report will not be able to calculate the Previous Quarter details until such time as the tables contain the relevant data for inclusion in the report.
- Affiliation totals are not included in the Summary report as these are Setting specific.
- Disability, Special Needs and Employed Status are the current status for the Member concerned, not necessarily their status in the Previous or Last Year's Quarter.
- Ages are calculated between the Date of Birth and the Event Date. It is possible that a Child having their 5th birthday within a quarter would appear in both the Reach Children Under 5 and Reach Children 5 – 18 Years totals, if the Child attended Events prior to and after their 5th birthday.

Quarterly Profile Outcomes

This report shows high level Reach and Volume Members Seen totals, by Outcome Types and Individual Outcomes, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.

The Report is grouped by Centre, Outcome Category and Outcome Type. A Summary option is available. The Summary Reach totals are NOT the sum of the Centre Reach totals, but have been calculated as the overall Reach totals, i.e. a Member that has attended both Centre 1 and Centre 2 within the quarter will only be counted as one.

Both Active and Inactive Members are reported.

The following Measures, by Quarter and Outcome Type are reported, if the data is available:

- Number of Event Types held
- Number of Events held
- Reach (All) at Events
- Reach (Carers) at Events
- Reach (Children) at Events
- Volume (All) at Events
- Volume (Carers) at Events
- Volume (Children) at Events
- Volume (Anonymous) at Events

The following Measures, by Quarter and Individual Outcomes are also reported, if the data is available:

- Reach (Carers)
- Reach (Children)
- Volume (Carers)
- Volume (Children)

The report options before running the report are:

- Seen at Setting
- Quarter

Please be aware of the following:

- **Select the Quarter you wish to report as "This Quarter". The "Previous Quarter" and "This Quarter Previous Year" Dates will be calculated automatically.**

Quarterly Profile Themes

This report shows high level Reach and Volume Members Seen totals, by Themes, for a number of measures, for a selected Quarter against the calculated previous quarter and the corresponding quarter in the previous year, in table format.

The Report is grouped by Centre and Theme. A Summary option is available. The Summary Reach totals are NOT the sum of the Centre Reach totals, but have been calculated as the overall Reach totals, i.e. a Member that has attended both Centre 1 and Centre 2 within the quarter will only be counted as one.

Both Active and Inactive Members are reported.

The following Measures, by Quarter and Theme are reported, if the data is available:

- Number of Event Types held
- Number of Events held
- Reach (All) at Events
- Reach (Carers) at Events
- Reach (Children) at Events
- Volume (All) at Events
- Volume (Carers) at Events
- Volume (Children) at Events
- Volume (Anonymous) at Events

The report options before running the report are:

- Seen at Setting
- Quarter

Please be aware of the following:

- **Select the Quarter you wish to report as "This Quarter". The "Previous Quarter" and "This Quarter Previous Year" Dates will be calculated automatically.**

Appendix B: UNA Report Descriptions

UNA Report (Latest Assessment)

The UNA report requires a valid Family ID for a Family which has had at least one UNA created. It only shows the Question Items selected from the latest UNA. The report also gives details of the Family (see Figure 212).

The UNA of Family by SCI (Social Capital Index) Scores report is similar to the this report but only shows the selected SCI Question Items from the Carer UNA of the Family. The last page also shows the SCI Scores with Classification of all the Carer UNAs in the Family. The Score Type name must contain **SCI** and the Score Details Classification must be set up for this last page to be displayed.

Member	Membertype		Gender	Language	Health Visitor at last assessment	Date of last asseesment	Data inputters name
Family						04/02/2008	demo
Denise Moore	Carer	Mother	Female	Chinese (Cantonese)		18/05/2009	ptesting
Donald Moore	Carer	Father	Male			08/04/2009	cpfrs

Family Name: Moore
Family ID: ID001223
GP Name: Dr. MPM rD ,elboNo
House number: 17
Street: Cadnam Lodge 34 Schooner Close
Town: Demoville
County:
Contact Number: 07773 835720
Postcode: Z14 3GQ
Email Address:

Firstnames:	Denise	Donald	
DOB	10/7/72	9/2/69	
Family	Adult	Adult	Child

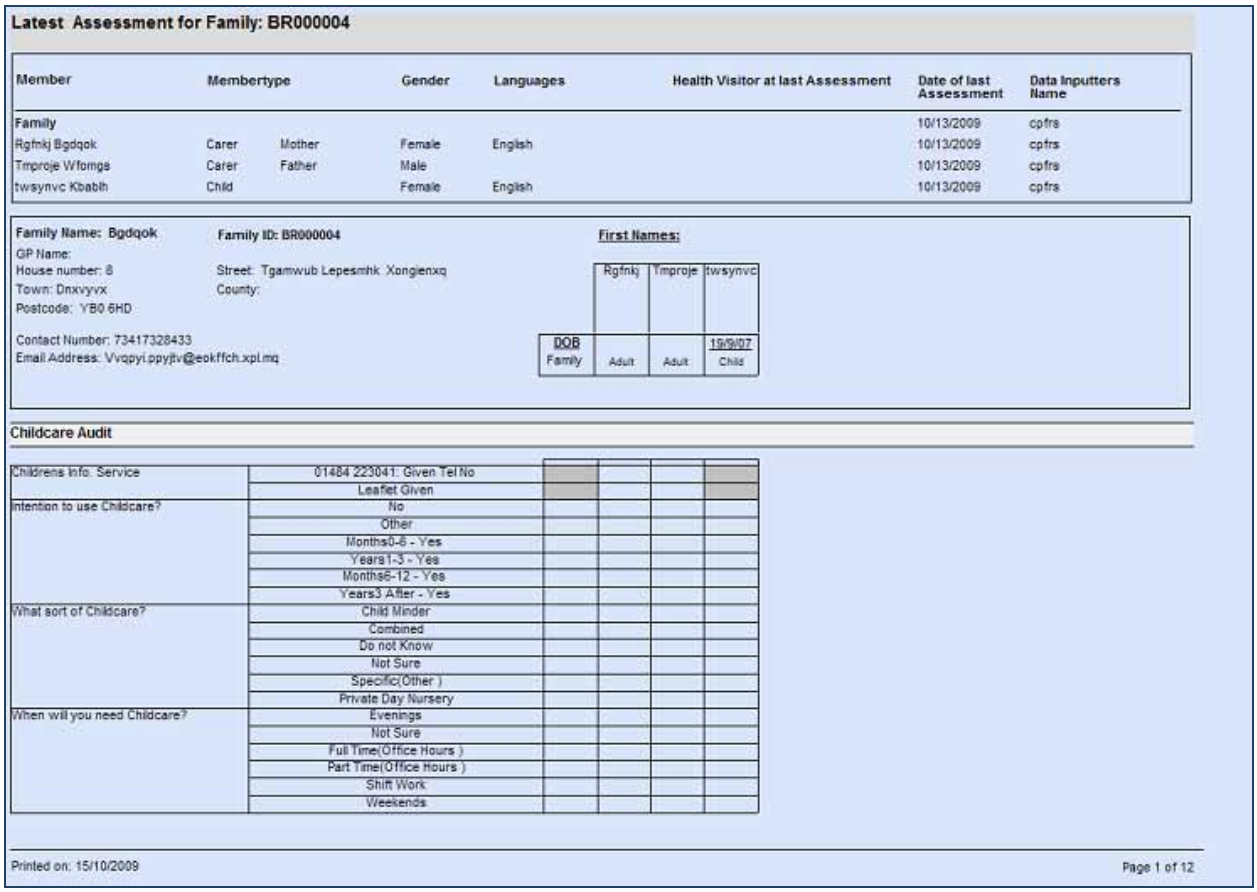
Emotional Wellbeing

Depression	Suffered Serious Depressive Illness			✓
Mental Health	Sleep Problems			✓

Figure 212 UNA (Latest Assessment) Report output

UNA Blank Form Report

UNA Blank Form Report requires a valid Family ID inserted into the Family ID field and the Blank Form check box should be selected. This will then display the information about the Family and Members at the top of the report with a list of UNA question items below. If only the Family ID has been entered then the same Family information can be seen at the top with the same UNA question items as well as the latest UNA question items that have been selected by the Family and Family Members. Use the UNA report (this is the first one in the UNA Category) for showing the same information without any UNA question items.



Latest Assessment for Family: BR000004

Member	Membertype		Gender	Languages	Health Visitor at last Assessment	Date of last Assessment	Data Inputters Name
Family						10/13/2009	cpfrs
Rgfnkj Bgdqok	Carer	Mother	Female	English		10/13/2009	cpfrs
Tmproje Wfomgs	Carer	Father	Male			10/13/2009	cpfrs
twsynvc Kbablh	Child		Female	English		10/13/2009	cpfrs

Family Name: Bgdqok
Family ID: BR000004
GP Name:
House number: 8
Street: Tgamwub Lepesmhk Xongienxq
Town: Dnxvyvx
County:
Postcode: YB0 6HD
Contact Number: 73417328433
Email Address: Vvqpyi.ppyjtv@eokffch.xpl.mq

First Names:

	Rgfnkj	Tmproje	twsynvc
DOB			19/9/07
Family	Adult	Adult	Child

Childcare Audit

Childrens Info. Service	01484 223041: Given Tel No				
	Leaflet Given				
Intention to use Childcare?	No				
	Other				
	Months0-6 - Yes				
	Years1-3 - Yes				
	Months6-12 - Yes				
	Years3 After - Yes				
What sort of Childcare?	Child Minder				
	Combined				
	Do not Know				
	Not Sure				
	Specific(Other)				
	Private Day Nursery				
When will you need Childcare?	Evenings				
	Not Sure				
	Full Time(Office Hours)				
	Part Time(Office Hours)				
	Shift Work				
	Weekends				

Printed on: 15/10/2009
Page 1 of 12

Figure 213 UNA Blank Form Report output

UNA by SCI (Social Capital Index) Report

The UNA by SCI (Social Capital Index) report displays information from the Carers of each UNA with Scores and Classification, who are registered at a Children's Centre Setting within the UNA Creation Date Range (Figure 214).

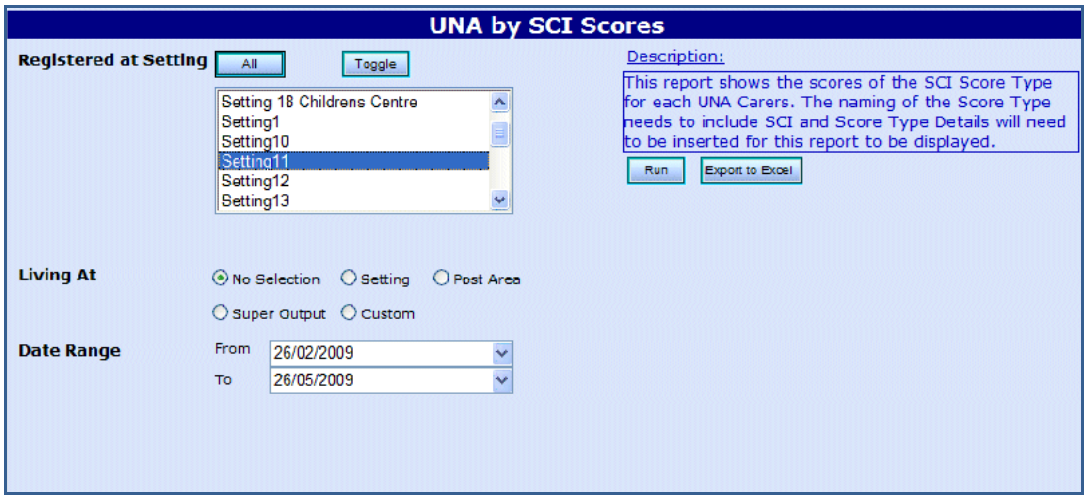
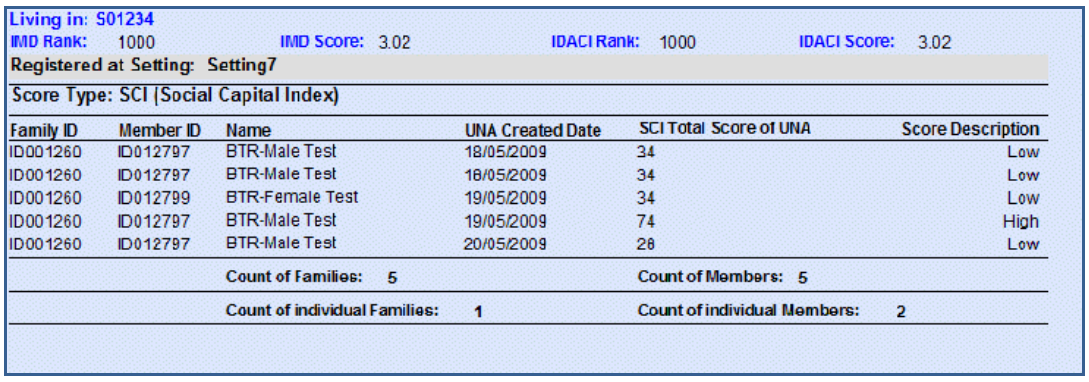


Figure 214 UNA by SCI Scores

There is an added option to also narrow down the search with **Living at**, which can be by Setting, Postcode, Super Output Area or even Custom Labels. Should Super Output have been selected as well for the Report Option, then the IMD and IDACI Ranking and Score will be listed underneath the Super Output Area, if they have been entered (Figure 215). The Score Type name includes the SCI and the Score Details Classification must be set in order for data to be displayed on this report. SCI is not included in other Score Type names. The maximum score a UNA with SCI Question Items can obtain is 100.



Living in: S01234
IMD Rank: 1000 IMD Score: 3.02 IDACI Rank: 1000 IDACI Score: 3.02
Registered at Setting: Setting7
Score Type: SCI (Social Capital Index)

Family ID	Member ID	Name	UNA Created Date	SCI Total Score of UNA	Score Description
ID001260	ID012797	BTR-Male Test	18/05/2009	34	Low
ID001260	ID012797	BTR-Male Test	18/05/2009	34	Low
ID001260	ID012799	BTR-Female Test	19/05/2009	34	Low
ID001260	ID012797	BTR-Male Test	19/05/2009	74	High
ID001260	ID012797	BTR-Male Test	20/05/2009	28	Low

Count of Families: 5 Count of Members: 5
Count of individual Families: 1 Count of individual Members: 2

Figure 215 UNA by SCI Scores Report output

UNA by Smoking Score Report

For the UNA by Smoking Score report (Figure 216), you need to have chosen the Registered at Children's Centre setting and the UNA Creation Date Range selection before running the report. **Living at** is an optional choice. The Score Type name needs to include the word **Nicotine** and the Score Details Classification must be set in order for data to be displayed on this report, therefore "Nicotine" must not be included in other Score Type names. The report shows the Score and Classification of each UNA answered by the carer and the Creation Date of the UNA can be seen next to the Score. The highest score that can be obtained is 10.

UNA by Smoking (Nicotine Dependency) Scores & Classification

Registered at: Setting11 and Setting7
Area lived in: N/A (None selected)
UNA Creation Date between 26/02/2009 **and** 26/05/2009

Registered at Setting: Setting11

Score Type: Nicotine Dependence (Smoking)

Family ID	Member ID	Name	UNA Created Date	Smoking Score of UNA	Addiction Classification
AP000987	AP000562	Linda Allen	14/05/2009	10	Heavy
AP000987	AP000563	George Allen	20/05/2009	1	Mild
AP000987	AP000563	George Allen	20/05/2009	3	Mild

Count of Families: 3 Count of Members: 3

Count of individual Families: 1 Count of individual Members: 2

Registered at Setting: Setting7

Score Type: Nicotine Dependence (Smoking)

Family ID	Member ID	Name	UNA Created Date	Smoking Score of UNA	Addiction Classification
ID000927	ID011852	Christine Smith	02/04/2009	7	Heavy
ID000117	ID000122	Pamela Smith	02/04/2009	3	Mild
ID001223	ID012680	Donald Moore	08/04/2009	1	Mild
ID000503	ID000709	Anna Cooper	15/05/2009	1	Mild
ID000958	ID011951	Joan Andrews	16/05/2009	3	Mild
ID001260	ID012797	BTR-Male Test	18/05/2009	1	Mild
ID001260	ID012797	BTR-Male Test	18/05/2009	1	Mild
ID001260	ID012799	BTR-Female Test	19/05/2009	2	Mild
ID001256	ID012786	Akshtest Test	19/05/2009	4	Moderate
ID001260	ID012797	BTR-Male Test	19/05/2009	4	Moderate

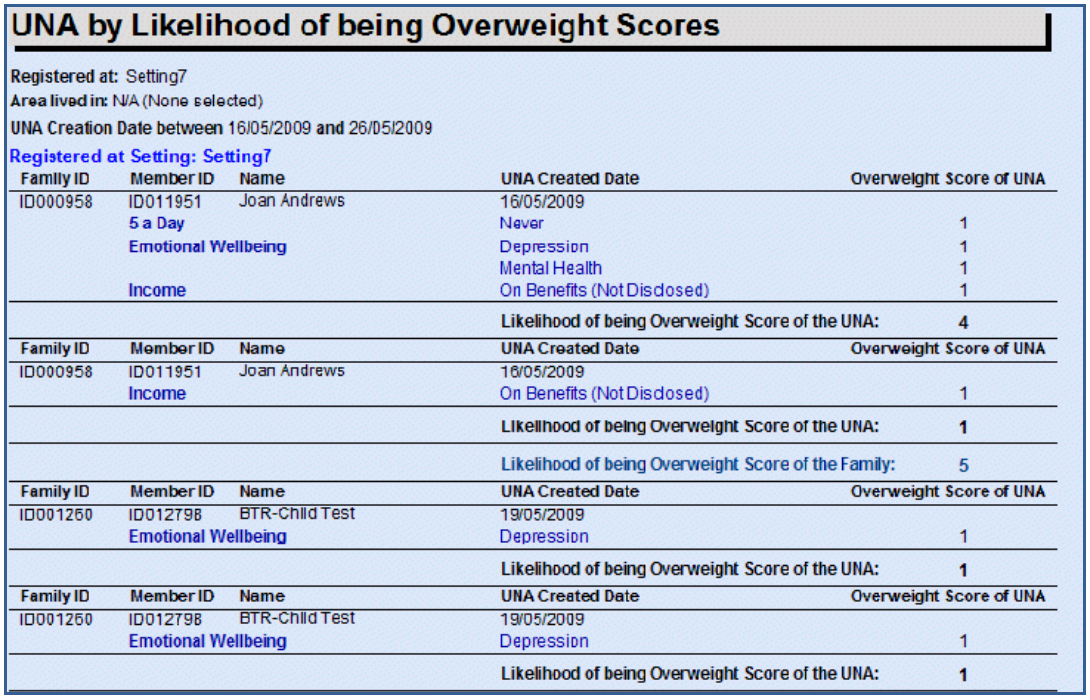
Count of Families: 10 Count of Members: 10

Figure 216 UNA by Smoking Score Report output

UNA by Overweight Score Report

For the UNA by Overweight Score (Figure 217) you need to choose the Registered at Children's Centre Setting and the UNA Creation Date Range before running the report. **Living at** is an optional choice. The Score Type name needs to include the word **Overweight** and the Score Details Classification requires to be set in order for data to be displayed on this report, therefore "Overweight" must not be included in other Score Type names.

The maximum score a UNA with Overweight Question Items can obtain is 10 for each family. It can, however, exceed 10 should the UNA Creation Date Range be wide and many UNAs with Likelihood of being Overweight Question Items selected for the UNAs. There are currently 10 Question Items that can count towards the Likelihood of being Overweight. Members can select one or many Question Items under Depression and these will only count as 1 whether all or one has been selected. The same applies to Mental Health. All the other 8 are counted as 1.



UNA by Likelihood of being Overweight Scores

Registered at: Setting7
Area lived in: N/A (None selected)
UNA Creation Date between 16/05/2009 **and** 26/05/2009
Registered at Setting: Setting7

Family ID	Member ID	Name	UNA Created Date	Overweight Score of UNA
ID000958	ID011951	Joan Andrews	16/05/2009	
	5 a Day		Never	1
	Emotional Wellbeing		Depression	1
			Mental Health	1
	Income		On Benefits (Not Disclosed)	1
			Likelihood of being Overweight Score of the UNA:	**4**

Family ID	Member ID	Name	UNA Created Date	Overweight Score of UNA
ID000958	ID011951	Joan Andrews	16/05/2009	
	Income		On Benefits (Not Disclosed)	1
			Likelihood of being Overweight Score of the UNA:	**1**
			Likelihood of being Overweight Score of the Family:	5

Family ID	Member ID	Name	UNA Created Date	Overweight Score of UNA
ID001260	ID012798	BTR-Child Test	19/05/2009	
	Emotional Wellbeing		Depression	1
			Likelihood of being Overweight Score of the UNA:	**1**

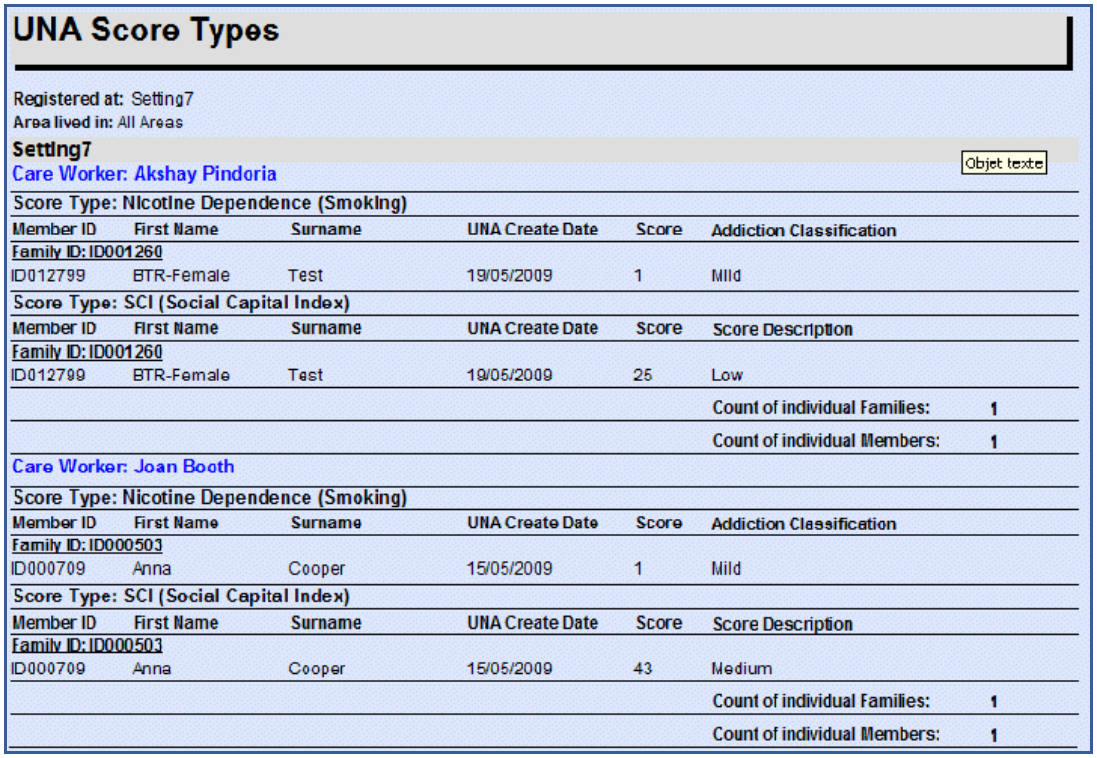
Family ID	Member ID	Name	UNA Created Date	Overweight Score of UNA
ID001260	ID012798	BTR-Child Test	19/05/2009	
	Emotional Wellbeing		Depression	1
			Likelihood of being Overweight Score of the UNA:	**1**

Figure 217 UNA by Likelihood of being Overweight Scores Report output

UNA Score Types Report

The UNA Score Types report (Figure 218) shows members grouped under their Registered Setting and Score Type. It also displays the UNA Creation Date although this is not given as a Date Range option before running the report. Living at (Setting, Postcode, Super Output Area or Custom Label) can be selected before running the report. It is also possible to see the Address Contact Information of the family by choosing **Yes** under Contact Info before running the report. The Classification of the Score Type can be seen, if it has been filled in, otherwise it will be just blank next to the score. The Score is simply a sum from the selected items assigned for the Score Type.

The Score Type of Likelihood of being Overweight is not included in this report - you should run the UNA by Overweight Scores report if you wish to see information for that Score Type.



UNA Score Types

Registered at: Setting7
Area lived in: All Areas

Setting7

Care Worker: Akshay Pindoria

Objet texte

Score Type: Nicotine Dependence (Smoking)

Member ID	First Name	Surname	UNA Create Date	Score	Addiction Classification
Family ID: ID001260					
ID012799	BTR-Female	Test	19/05/2009	1	Mild

Score Type: SCI (Social Capital Index)

Member ID	First Name	Surname	UNA Create Date	Score	Score Description
Family ID: ID001260					
ID012799	BTR-Female	Test	19/05/2009	25	Low
				Count of individual Families:	1
				Count of individual Members:	1

Care Worker: Joan Booth

Score Type: Nicotine Dependence (Smoking)

Member ID	First Name	Surname	UNA Create Date	Score	Addiction Classification
Family ID: ID000503					
ID000709	Anna	Cooper	15/05/2009	1	Mild

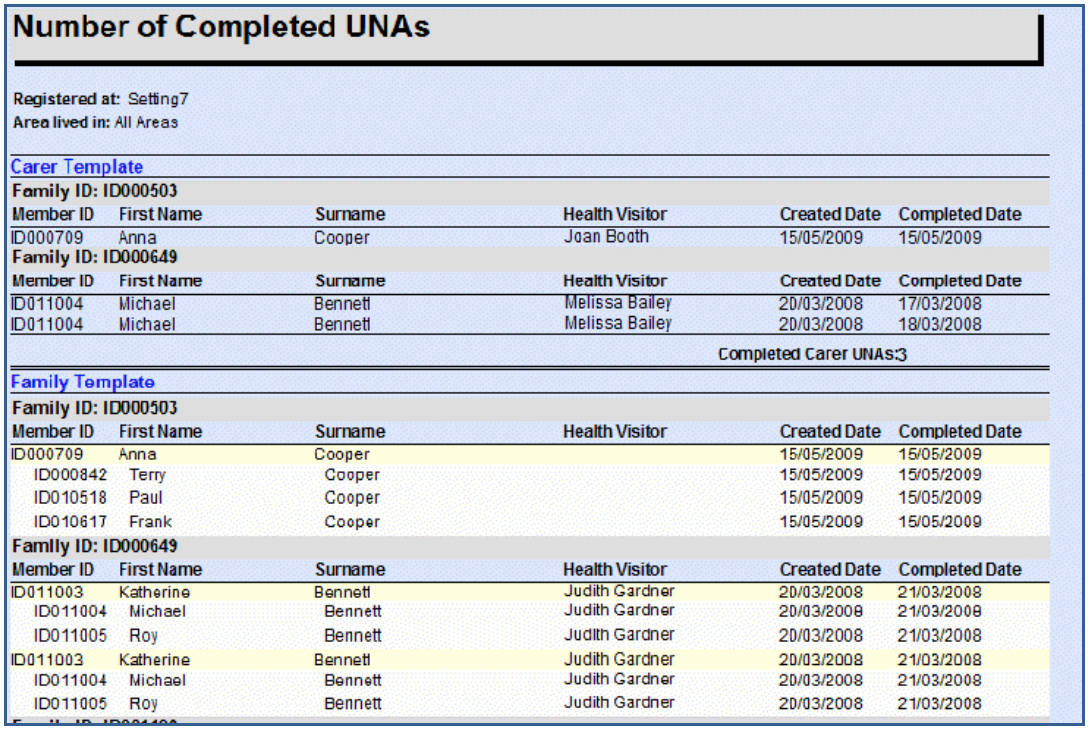
Score Type: SCI (Social Capital Index)

Member ID	First Name	Surname	UNA Create Date	Score	Score Description
Family ID: ID000503					
ID000709	Anna	Cooper	15/05/2009	43	Medium
				Count of individual Families:	1
				Count of individual Members:	1

Figure 218 UNA Score Types Report output

Completed UNAs Report

The Completed UNAs report (Figure 219) shows completed UNAs by Template Type with information about the members. It also displays the UNA Creation Date and Completed Date. The UNA has to have a Completed Date for it to be listed in this report. Living at (Setting, Postcode, Super Output Area or Custom Label) can be selected before running the report. It is also possible to see the Address Contact Information for the family by selecting **Yes** under Contact Info before running the report.



Number of Completed UNAs

Registered at: Setting7
Area lived in: All Areas

Carer Template

Member ID	First Name	Surname	Health Visitor	Created Date	Completed Date
Family ID: ID000503					
ID000709	Anna	Cooper	Joan Booth	15/05/2009	15/05/2009
Family ID: ID000649					
ID011004	Michael	Bennett	Melissa Bailey	20/03/2008	17/03/2008
ID011004	Michael	Bennett	Melissa Bailey	20/03/2008	18/03/2008
				Completed Carer UNAs:3	

Family Template

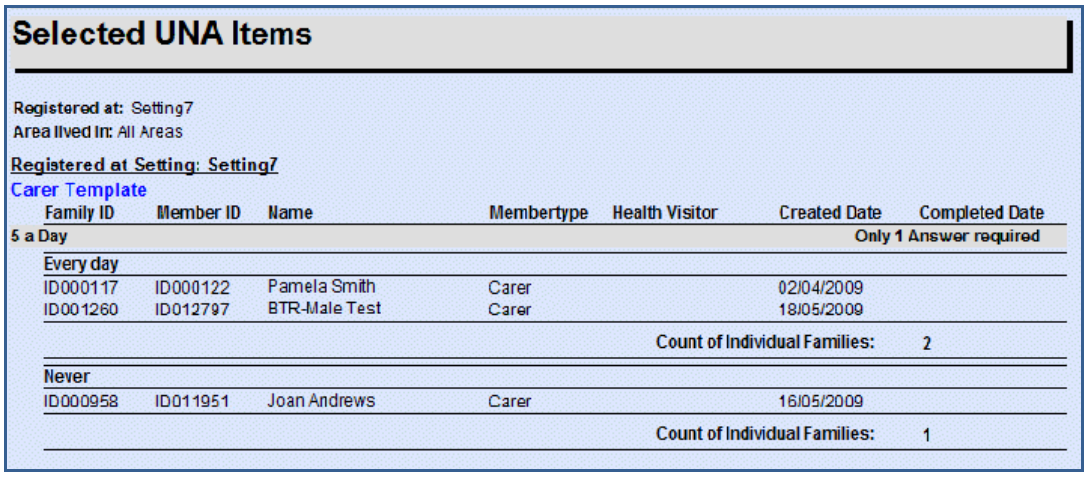
Member ID	First Name	Surname	Health Visitor	Created Date	Completed Date
Family ID: ID000503					
ID000709	Anna	Cooper		15/05/2009	15/05/2009
ID000842	Terry	Cooper		15/05/2009	15/05/2009
ID010518	Paul	Cooper		15/05/2009	15/05/2009
ID010617	Frank	Cooper		15/05/2009	15/05/2009
Family ID: ID000649					
ID011003	Katherine	Bennett	Judith Gardner	20/03/2008	21/03/2008
ID011004	Michael	Bennett	Judith Gardner	20/03/2008	21/03/2008
ID011005	Roy	Bennett	Judith Gardner	20/03/2008	21/03/2008
ID011003	Katherine	Bennett	Judith Gardner	20/03/2008	21/03/2008
ID011004	Michael	Bennett	Judith Gardner	20/03/2008	21/03/2008
ID011005	Roy	Bennett	Judith Gardner	20/03/2008	21/03/2008

Figure 219 Completed UNAs Report output

Completed UNA Items Report

The UNA Items report (Figure 220) show the Members who have answered selected Question Items in their UNAs. These items will have been chosen before running the report e.g. if you select a **Registered at Setting** and then Under 5 A Day click **Never** and **Every Day**, the report will then show members who have answered these two options.

The report is grouped by Registered/Living At Setting and then the Template type followed by the Question Item. It can be seen whether Members of the same Family have answered the same Question Item.



Selected UNA Items

Registered at: Setting7
Area lived in: All Areas

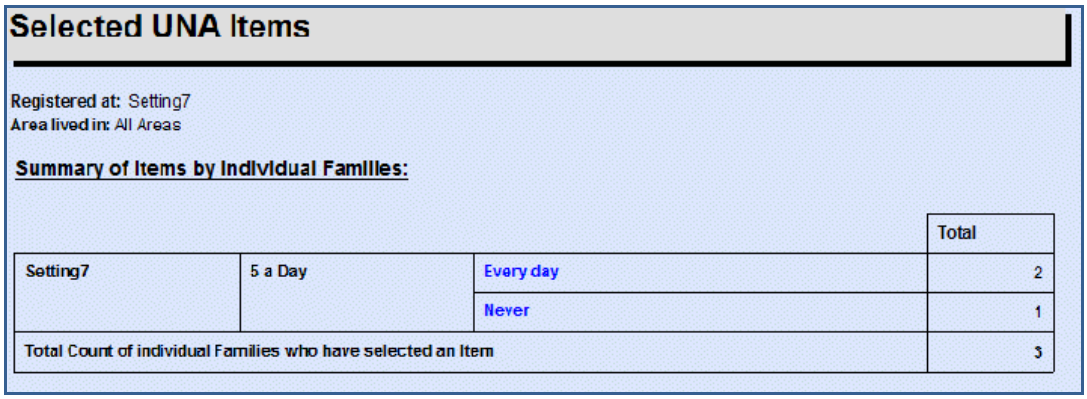
Registered at Setting: Setting7

Carer Template

Family ID	Member ID	Name	Membertype	Health Visitor	Created Date	Completed Date
5 a Day						Only 1 Answer required
Every day						
ID000117	ID000122	Pamela Smith	Carer		02/04/2009	
ID001260	ID012797	BTR-Male Test	Carer		18/05/2009	
				Count of Individual Families:		2
Never						
ID000958	ID011951	Joan Andrews	Carer		16/05/2009	
				Count of Individual Families:		1

Figure 220 UNA Items Report output

This report includes a Summary table (Figure 221) and it can be displayed via the Summary button in the report or the Summary Check Box when running the report.



Selected UNA Items

Registered at: Setting7
Area lived in: All Areas

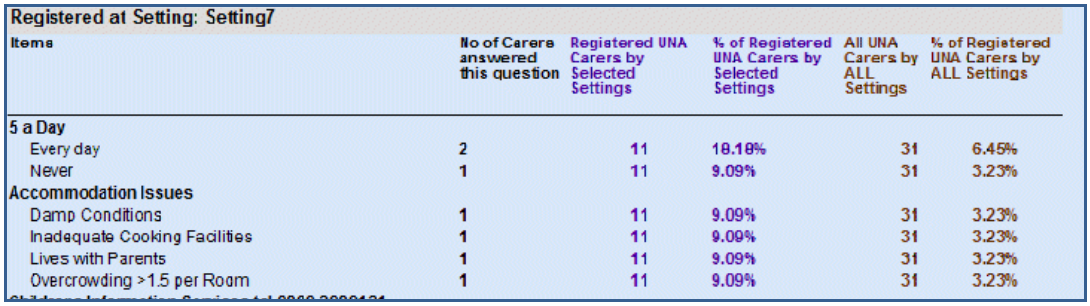
Summary of Items by Individual Families:

			Total
Setting7	5 a Day	Every day	2
		Never	1
Total Count of individual Families who have selected an Item			3

Figure 221 UNA Items Report output - Summary

UNA Items by Carer Report

The UNA Items by Carers with % report (Figure 222) show two percentage calculations. It works out the percentage of carers who have selected the Question Item, within their UNA Created Date, against the total number of carers who have had UNAs created in the same Date Range of the chosen settings. The last column (in brown) calculates the percentage of carers who have selected the Question Item against all the carers in all the settings, with UNAs created in the selected Date Range.



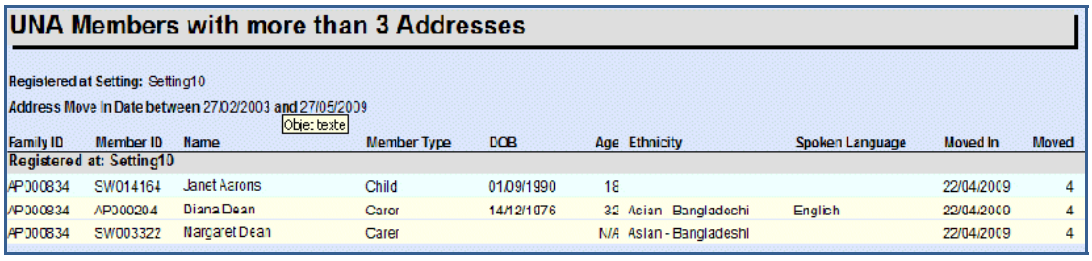
Registered at Setting: Setting7

Items	No of Carers answered this question	Registered UNA Carers by Selected Settings	% of Registered UNA Carers by Selected Settings	All UNA Carers by ALL Settings	% of Registered UNA Carers by ALL Settings
5 a Day					
Every day	2	11	18.18%	31	6.45%
Never	1	11	9.09%	31	3.23%
Accommodation Issues					
Damp Conditions	1	11	9.09%	31	3.23%
Inadequate Cooking Facilities	1	11	9.09%	31	3.23%
Lives with Parents	1	11	9.09%	31	3.23%
Overcrowding >1.5 per Room	1	11	9.09%	31	3.23%

Figure 222 UNA Items by Carers Report output

UNA Members with more than Three Addresses Report

The UNA Members with >3 Addresses report (Figure 223) records all members with either a Child or Carer UNA, who have moved address. This is logged when the Change Address option is selected within the Family Details and will only include the Family Address. The Move Date needs to be selected when entering a new address as this report will only pick up address changes with a Moving In date. The report is grouped by Registered at Setting and it is then sorted by age.



UNA Members with more than 3 Addresses

Registered at Setting: Setting10

Address Move In Date between 27/02/2003 and 27/05/2009

Obie: texte

Family ID	Member ID	Name	Member Type	DOB	Age	Ethnicity	Spoken Language	Moved In	Moved
Registered at: Setting10									
AP000834	SW014164	Janet Aarons	Child	01/09/1990	18			22/04/2009	4
AP000834	AP000204	Diana Dean	Carer	14/12/1976	32	Asian Bangladeshi	English	22/04/2009	4
AP000834	SW003322	Margaret Dean	Carer		N/A	Asian - Bangladeshi		22/04/2009	4

Figure 223 UNA Members with more than Three Addresses Report output

Glossary

Adult Transition Date

The **Adult Transition Date** is the date on which the vulnerable young person will be considered an adult. This is the date on which the young person's details will be archived from ContactPoint.

Affiliation

A link between a family and a setting in eStart. An affiliation might be requested because a family are attending an event at a setting to which they are not registered. A family can have as many affiliations as necessary and each of these is an involvement for each member that can be sent to ContactPoint.

Assertion

See SAML Assertion

CMS

Case Management System. A system for managing involvements between professionals and people. eStart is a CMS.

Communication to ContactPoint

A three value flag recorded against the inactive reason. When a person is made inactive, this flag determines what is sent to ContactPoint:
Continue Communication – information for the person is still sent to ContactPoint
Cease Communication – information for the person is no longer sent to ContactPoint
Archive Person – the person is archived from ContactPoint and communication ceases.

Consent for Over 18

ContactPoint only stores information for people who have not yet reached their 18th birthday. However in special circumstances (such as Connections, or vulnerable young people) ContactPoint can retain the details of someone who has passed their 18th birthday. To do this, the consent of the person themselves, or of their parent/carer is needed.

DCSF

Department for Children, Schools and Families. The government department that oversees the ContactPoint project and system.

Disputes

A child or their parent/carer may dispute the validity of the information recorded on ContactPoint. This dispute is recorded on ContactPoint and a warning is provided if a child with disputed information is retrieved from ContactPoint. eStart will not display the detail of the disputed information, but this can be accessed separately through the ContactPoint interface.

Dynamic Lists

Dynamic Lists are those in which the list of matches on the left hand side of the screen is saved, along with the search criteria. A Dynamic list can be distinguished from a Static list by (*) in front of the list name and can be saved as either **Public** or **Private**.

ECM

Every Child Matters. A shared programme of change to improve outcomes for all children and young people.

Fragment

A packet of information about a child that is transmitted to ContactPoint. It includes: ID, demographics, addresses, parent/carers, involvements.

Full Refresh

A Load of every qualifying person from a CMS system to ContactPoint. For eStart this will be most of the children under the age of 18.

IdP

Identity Provider. ContactPoint has delegated the validation of users' credentials to Identity Providers. These are separate organisations on the internet that receive credentials from users and validate them. If the IdP is satisfied they issue a SAML assertion for the user.

Involvement

A interaction between a Practitioner and a child that is to be sent to ContactPoint. In eStart, Registration or Affiliation at a setting is an Involvement.

Left England

A flag recorded against a person: this is displayed as a checkbox allowing you to switch Yes/No. If the flag is true(Yes), the person has left England and has no intention to return within the next 3 years

Load

The ContactPoint webservice that allows a CMS to send fragments to ContactPoint.

Outside England

A flag recorded against an address: this is displayed as a checkbox allowing you to switch Yes/No. If the flag is f (Yes), the property at that address is deemed to be outside England.

Permissions

Permissions (or **User Rights)**, are the settings in eStart made by a Console Administrator, that control the ability of a single user or groups of users to view or edit specific areas of eStart.

Pre-Archive Period

A number recorded against each involvement that specifies how long the involvement will remain on ContactPoint after it has ended.

SAML

Security Assertion Mark-up Language. SAML is a recognised standard for exchanging authorisation and authentication information.

SEF

Self Evaluation Form.

SENCO

Special Educational Needs Coordinator.

Send To ContactPoint

A Yes/No flag against an involvement. If Send To ContactPoint is ticked (Yes), it means that the user intends the involvement to be sent to ContactPoint when a fragment is sent for the person.

Service Provision Type

A classification for Service Provisions. The permitted values for Service Provision Type are supplied by ContactPoint in the Configuration File.

Static Lists

For Static Lists the list of **Selected** names is saved but the search criteria are **not** saved. The list saved is that on the right hand side of the screen.

Stop Notice

A notice sent to a CMS (i.e. eStart) by ContactPoint to say that it does not want to receive any more information about a person.

TCP

Training Centre Plus. This designed to empower Carers wishing to get into or return to the workplace by providing valuable marketable skills and, in some instances qualifications.

UNA

Universal Needs Assessment. A multi-agency tool within eStart that maps and track child and carer needs through the use of questions about a child and carer's 'well-being'.

URL

Uniform Resource Locator. This specifies the location of a resource on the internet. In the case of ContactPoint, URLs are used to specify where to find the ContactPoint web services.

User Assertion

A SAML assertion issued by the IdP to identify the user and the ContactPoint functions they can perform.

XML

eXtensible Markup Language. A set of rules used to transport and store data electronically. It is the recognised standard language used in describing the content of the information passed to and from ContactPoint.

Index

A

Access Log 46, 48
Activities 22
Add
  Activities 22
  Carer 11
  Child 14
  Children and Carers 11
  Confidential Notes 26
  ContactPoint Consent 35
  Family 9
  Family Contact 22
  General Notes 25
  Involvement for a Setting 20
  New UNA 87
  New UNA Template 89
  Referrals 44
  Registrants 104
  SEF 98
  SEF Template 96
  Service Requests 26
  TCP Accreditors 100
  TCP Course 102
  TCP Qualifications 100
Add a Carer 11
Add a Child 14
Add a New Family 9
Add a TCP Course 102
Add Children and Carers 11
Adding Consent to Store Details of Person over 18 on ContactPoint 35
Additional Details for a Family 21
Address
  Change 21
  Family 9
Address and Languages 38
Address Details 9
Adult Transition Date 35, 76
Affiliation Details 18
Affiliations 10, 18
  Request 7
Anonymous Members 54
Answering the Security Questions 1
Append 66
Appointments Missed 139
Assign Score Values 94
Attendees 52, 54
Audit Log 46
Audit Log and Access Log 28
Audit Log Report 112, 149
Audit Logs 112, 149

B

Benefits 33
Birth and Development 43
Birth Details 15
Birth of Children by Weight Report 141
Birth of Children Report 120
Births of Children by Weight Report 142
Births of Children Report 141
Breast Feeding 15
Breast Feeding Category 142
Breast Feeding Reports 111, 142
Build or Update a Template 97

C

CAF 44, 76
Calendar 58
  Day View 59
  Month View 60
  Week View 59
Care Worker
  Add to Event 23, 54
  Merge 49
  Reports 111, 143
  TCP Courses 104
  Time Spent on Event 56
Care Worker Reports 111, 143
Care Workers working with Dev Plan Targets Report 145
Carer
  Add 11
  Additional Details 38
  Address 38
  Address and Languages 12
  Benefits 33
  Delete 35
  Details 29
  Disabilities 34
  Health 38
  Languages 38
  Merge 49
  Name History 30
  Parental Responsibility 15, 41
  Pregnancy 19, 39
  Referrals 44
  Reports 108, 121
  Smoking History 13, 32

Special Needs 33
TCP Courses 105
Warnings 34
Carer Details 29
Carer Reports 108, 121
Carer TCP Courses 105
Carers & Children Joining Report 130
Carer's Address and Languages 12
Carers Category 121
Carers Joining Report 131
Carers Not Seen Report 138
Carers Now Registered Report 123
Carer's Record - Additional Details 38
Carers Seen (Reach) Report 121
Carers Seen (Volume) Report 122
Carers Seen by Activity (Reach) Report 122
Carers Seen by Activity (Volume) Report 122
Carers Seen by Activity with Anonymous Report 123
Carer's Smoking History 13
Carers Who No Longer Attend Their Registered/ Affiliated Settings 140
Careworker Category 143
Careworkers and Events (Reach) Report 143
Careworkers and Events (Volume) Report 143
Careworkers and Events Summary (Reach) Report 143
Careworkers and Events Summary (Volume) Report 144
Careworkers and Hours worked at Events Report 144
Case Management 44
Change an Address 21
Changing Your Security Answers 2
Child
Add 14
Additional Details 43
Birth 43
Carers 15, 41
Child Protection Register 42
Details 40
Development 43
Health Details 15
Merge 49
Referrals 44
Child Birth Weight Report 120
Child Details 40
Child Details (ContactPoint) 80
Child Details Tab 80
Child Protection Register 42
Children Act 2004 76
Children Category 116
Children Joining Report 131
Children Not Seen Report 138
Children Now Registered Report 119
Children Reach Report 148
Children Registered by Disability & Special Needs Report 120
Children Registered by Ethnicity Report 119
Children Reports 108, 116
Children Seen (Reach) Report 116
Children Seen (Volume) Report 117
Children Seen by Activity (Reach) Report 118
Children Seen by Activity (Volume) Report 118
Children Seen by Activity with Anonymous Report (Volume) 118
Children Seen by Age (Reach) Report 117
Children Seen by Age (Volume) Report 117
Children Volume Report 149
Children Who No Longer Attend Their Registered/ Affiliated Settings 139
Child's Health Details 15
Child's Record - Additional Details 43
Colours and Indicators 3
Common Assessment Framework 76
Completed UNA Items Report 160
Completed UNAs Report 128, 159
Confidential Notes 26
Confidential Notes Tab 26
Consent to Store Details on ContactPoint 32, 35
ContactPoint 41, 76
Address 9, 31, 41
Authentication 78
Child Details 80
Communication 30
Consent 32, 35, 42
ContactPoint and eStart 76
Date of Death 31, 41
Delete Involvement 19
Disputes 81
End Involvement 19
Involvement End Date 18
Involvement Start Date 18
Involvements 18, 76
Left England 31, 41
Overview 76
Parent/Carers 80
Pre-Archive Period 19
Returning to England 31, 41
Search 78
Search Screen 79
Send to ContactPoint 30
Sensitive Services 81
Service Provisions 81
Stop Notice 11, 14, 31, 41, 77
Whose Records are Sent? 77
ContactPoint - Child Details 80
ContactPoint and eStart 76
ContactPoint Authentication 78
ContactPoint Overview 76

ContactPoint Search Screen 79
Cost Effectiveness 84
  Aims 85
  Costs 84
  Criteria 85
  Reports 86
  Targets 85
Costs 84
CPR History 42
Create Default UNA 87
Create New List 62
Create New Template 89
Create New UNA 87
Create or Update a SEF 98
Criteria, Targets and Aims (% of an Event) 85
Criteria, Targets and Aims (Editing) 85
Custom Fields 27, 112
Custom Fields Category 147
Custom Fields Reports 27, 112, 147
Custom Query Report 112
Custom Report 147

D

Date of Death 31
Day View 59
Delete
  Involvement 19
  Registrants 104
  TCP Course 103
Delete a Carer 35
Dev Plans & Due Dates Report 145
Development Plan Category 145
Development Plan Reports 111, 145
Digipen 82
Disabilities 34
Disputes 81
Duplicate Event 53, 60
Duplicates - Merging 49
Dynamic List 64

E

ECM 76, 84
Edit
  Registrants 104
  TCP Course 103
Edit and Submit Your Form 83
Edit TCP Course 103
Electronic Registration 82
  Edit Form 83
  Getting Started 82
  Search for a Form 82
  Submit Form 83
Email 62, 68, 72
  List 68
  Messages 72
End Involvement 18, 19
eNurseries 41
Event Attendees/Registrants 54
Event Details 53
Event Outcomes 56
Event Reach/Volume Category 132
Event Reach/Volume Reports 110, 132
Event Recurrence 60
Event Type Report 148
Events 52
  Add 52
  Attendees 54
  Calendar 58
  Dates 53
  Details 53
  Duplicate 53, 60
  Events by Aims Reports 112, 148
  Favourites 57
  Outcomes 56, 57
  Reach/Volume Reports 110, 132
  Recurrence 60
  Register 53
  Registrants 54
  Satisfaction Ratings 56
  Type 52
  View Event Types 56
Events (Reach) by Activity Report 133
Events (Reach) By Ethnicity Report 135
Events (Reach) By Location Report 134
Events (Reach) by Outcome Report 136
Events (Reach) By Provider Report 134
Events (Reach) By Theme Report 135
Events (Reach) Report 132
Events (Volume) by Activity with Anonymous Report 133
Events (Volume) Report 132
Events by Aims Category 148
Events by Aims Reports 112, 148
Events Calendar 58
Events Section 52
Every Child Matters 76, 84
Export 66
  .CSV 69
  Mail Shot 66
  To CTF 70
  To Excel 69
  XML 70
Export List 66
Export to CTF 70
Export to Excel 69
Exporting a Report 115

F

Families Category 124
Families Joining Report 130
Families Now Registered Report 125
Families Seen (Reach) Report 124
Families Seen (Volume) Report 124
Family
  Activities 22
  Add 9
  Additional Details 21
  Address 9
  Details 16
  GP and Health Visitors 10
  Items Borrowed 28
  Merge 49
  Notes 24
  Registration Setting and Affiliation Details 10
  Reports 27, 108, 124
Family Icons 17
Family Reports 108, 124
Family Screen 16
Favourites 57
Favourites (Events) 57
Fragments 76

G

Getting Started 82
GP and Health Visitors 10

H

Hard to Reach 27
Hard to Reach Report 148
Hard to Reach Reports 27, 112, 148
Hard to Reach Reports Category 148
Health 38
Health Category 142
Health Details 15
Health Reports 111, 142
Health Visitor 10
How to Access Cost Effectiveness 84

I

Icons 3
  Family 17
Inactive Description 30
Inbox 74
Involvement End Date 18
Involvements 18, 55, 76
Items 28

L

Left England 31
Link Documents 37
List Admin 71
Lists 62
  Append 66
  Dynamic 64
  Dynamic List - Save as or Export 64
  Email 68
  Export 66
  Export to CTF 70
  Export to Excel 69
  List Admin 71
  Mail Shot 66
  Mailing Label 67
  My Lists 70
  New 62
  Other Lists 71
  Private 65, 70
  Public 65, 70, 71
  Save 65
  Search Criteria 62
  Static 64
  Static List - Save as, Append or Export 64
  Text Messages 68
Logging into eStart 1

M

M3 (Registered at requested Settings) Report 146
M3 (Seen at requested Settings) Report 146
M7 Report 146
Mail Merge 66
Mail Merge Families Registered 125
Mail Shot 66
  Email 68
  Mailing Label 67
  Text Messages 68
Mailing Label 67
Manage Lists 62
Manage SEFs 97
Manage Templates 96
Map button 17
Members and Hours spent at Events Report 144
Members Seen by Ethnicity Report 136
Members Seen By Provider and Setting Report 137
Members Seen By Provider Report 137
Merge 49
Merging and Moving 49
Messages 72
  Email 72

Inbox 74
Sent Items 74
SMS 73
Text 73
Modify Existing Template 92
Monitoring eStart Use 46
Month View 60
Monthly Summary Members Seen (Reach) Report 125
Monthly Summary Members Seen (Volume) Report 126
Mothers Not Seen 139
Move 49
My Lists 70

N

Name History 30
NCH Section 1 Report 147
NCH Section 2 Report 147
Non Attendance Category 138
Non Attendance Reports 110, 138
Notes 24
Confidential Notes 26
Notes History 25
Summary 26
Notes History Tab 25

O

Other Lists 71
Outcomes 56
Outcomes Summary 57
Outside England 9, 31, 41

P

Parent/Carers 80
Parent/Carers Tab 80
Parental Responsibility 15, 41
People Icons 3
People Search 4
Pre-Archive Period 19
Pregnancy 19, 39
Reports 111, 140
Pregnancy & Birth Category 140
Pregnancy and Birth Reports 111, 140
Pregnant Teenagers Now Registered Report 140
Pregnant Women Seen (Reach) Report 141
Providers with Events (Basic) Report 136
Providers with Events (Detailed) Report 137

Q

Quarterly Profile Main Report 149
Quarterly Profile Outcomes 151
Quarterly Profile Themes 152
Quarterly Profiles 112
Quarterly Profiles Category 149

R

Reach and Volume Reports 116
Reach Reports 116
Record of Breast Feeding Report 142
Recurring Events 60
Referrals 44
Register of Event Attendees 53
Registrants 52, 54, 104
Registration (Joining) Category 130
Registration and Affiliation Details 18
Registration Details 18
Registration Reports 109, 130
Registration, Setting and Additional Affiliation Details 10
Registration, Setting and Affiliation Details 10
Report Criteria 113
Report Toolbar 114
Reports 86, 107
Audit Log 112, 149
Breast Feeding 111, 142
Care Worker 111, 143
Carer 108, 121
Children 108, 116
Custom Fields 27, 112, 147
Custom Query 112
Development Plan 111, 145
Events 110, 132
Events by Aims 112, 148
Export Formats 115
Export to Excel 114
Extended Descriptions 116
Family 27, 108, 124
Hard to Reach 27, 112, 148
Health 111, 142
Non Attendance 110, 138
Pregnancy and Birth 111, 140
Quarterly Profiles 112, 149
Reach 107, 116
Registration 109, 130
Report Criteria 113
Reports Toolbar 114
Running Reports 114
Summary 114
Sure Start 111, 146
Types 107

UNA 109, 127, 153
Volume 107, 116
Reports Overview 107
Request Affiliations 7
Returning to England 31, 41
Run SEFs 99
Running a Report 114
Running Reports 114

S

Satisfaction Ratings 56
Save List 65
Save UNA 87
Score 94
Search
Electronic Registration Forms 82
For a ContactPoint record 78
For a Person 4
To Create a List 62
Using Wildcards 5
Search ContactPoint 78
Search for a Form 82
Search Results 5
Security Questions 1, 2
SEF
Add New 98
Manage 97
Manage Templates 96
Run SEFs 99
SEF Builder 96
Update 98
SEF Builder 96
SEF Template
Build 97
Manage 96
Update 97
Select UNA to Create 88
Self Evaluation Forms 96
Send to ContactPoint 19, 55
Sending an Email through eStart 72
Sending an SMS Message through eStart 73
Sending Messages through eStart 72
Sensitive Services 81
Sent Items 74
Service Provisions 81
Service Provisions Tab 81
Service Requests 26
Setting Involvement Details 18
Setting up Accreditors and Qualifications 100
Smoking History 32
Carer 13, 32
Smoking Record Report 142
SMS Messages 62, 68, 73
Special Needs 33
Start From Scratch 90
Static List 64
Status 30
Stop Notice 11, 14, 31, 41, 77
Summary (Notes) 26
Summary Members Seen (Reach) Report 126
Summary Members Seen (Volume) Report 126
Summary Tab 26
Support 1
Sure Start Category 146
Sure Start Reports 111, 146

T

TCP 100
Accreditors 100
Add Course 102
Add, Edit and Delete Registrants 104
Attendees 104
Care Workers 104
Carers 105
Course Attendance 106
Delete Course 103
Edit Course 103
Members 104
Qualifications 100
Register Carer for Course 105
Technical Support 1
Template
SEF 96
UNA 89
Text Messages 62, 68, 73
The People Search Facility 4
To CTF 70
To Excel 69
Training Centre Plus 100
Types of Report 107

U

UNA 86
Assign Score Values 94
Create Default 87
Create New 87
Create New Template 89
Maintenance 89
Modify Existing Template 92
Reports 109, 127, 153
Save 87
Score 94
Score Administration 94
Select UNA 88
Template 88, 89, 92

Template Administration 89
View History 88
UNA - Universal Needs Assessment 86
UNA Blank Form Report 127, 154
UNA by Overweight Score Report 128, 157
UNA by SCI (Social Capital Index) Report 155
UNA by SCI Report 127
UNA by Smoking Score Report 128, 156
UNA Category 127
UNA Items by Carer Report 161
UNA Items by Carers with % Report 129
UNA Items Report 129
UNA Maintenance 89
UNA Members with >3 Addresses Report 129
UNA Members with more than Three Addresses Report 161
UNA of Family by SCI Scores Report 127
UNA Report 127
UNA Report (Latest Assessment) 153
UNA Report Descriptions 153
UNA Reports 109, 127, 153
UNA Score 94
Assign Score Weightings 96
Assign Values 94
Create New Score Type 96
Remove Score Weightings 96
UNA Score Administration 94
UNA Score Types Report 128, 158
UNA Template
Delete Node 93
Drag and Drop 92
Make Exclusive 91
New Node 91
New Section 90
Overwrite Existing Template 93
Rename Node 91
Save to New Template 93
Start from Scratch 90
Turn Node into Section 93
UNA Template Administration 89
Unborn Baby 19
Universal Needs Assessment 86
User Assertion 78

V

View Event Types 56
View UNA History 88
Volume Reports 116

W

Warnings 34
Week View 59
Whose Records are sent to ContactPoint? 77
Wildcard 5